



# QUIRK'S

Marketing Research Review

www.quirks.com

July/August 2002

# Online research issue

Fidelity Investments  
offers respondents a  
choice: Web or  
phone?

Three online  
survey packages  
reviewed

A primer on the  
wireless Web



# If information is power, we can make you a hero.

The crisis is looming. The client needs answers. Your already hectic job just got worse. You need more than a data collector, you need a partner. Someone to help you transform the survey dropped on your desk into actionable information so comprehensive that even the most discriminating client is impressed. You need Communications Center.

We stand by your side and burn the midnight oil with you. Reviewing your survey and making recommendations, fielding and managing all aspects of the collection process, and most importantly working with you to exceed your client's expectations. Our combined efforts do more than get answers, they create legends.

Research Services, Extraordinary Solutions



COMMUNICATIONS  
CENTER<sup>INC.</sup>

1-866-YOUR-CCI • [www.ccicorporate.com](http://www.ccicorporate.com)



Meet Your Customers!



## Get Beyond The Introductions.

**C&R**  
RESEARCH

Let's Find Out.

Almost any qualitative moderator can introduce you to your customers. But at C&R, we have a team of exceptional qualitative researchers who know the right techniques and approaches that help consumers communicate what they feel, need, and want. Because while meeting your customers is nice, understanding them is what's important.

*Ask us about our newest creative qualitative solutions.*

312.828.9200 • (fax) 312.527.3113 • [www.ccresearch.com](http://www.ccresearch.com)



# QUIRK'S

## Marketing Research Review

Volume XVI, Number 7

July/August 2002



### C O N T E N T S

## FEATURES

### Case History

#### 20 If given the choice

Fidelity Investments finds respondents like phone-Web survey option

### Techniques

#### 22 The need for speed

Time-savings as a competitive distinction for online research

#### 28 At my own pace in my own place

Respondents share their thoughts on participating in online bulletin board research

#### 34 Do as I do, not as I say

Thoughts on testing Web site usability

#### 38 The wireless Web

A primer for market research professionals

#### 44 Choose your usability approach wisely

Success comes from picking the right tools for the job

#### 50 Using neural networks to analyze surveys

Part II: building the networks

#### 62 Do it yourself, Web-style

A look at three Web survey software packages

#### 66 My opinion counts

Online research from the participant's perspective

#### 70 Privacy, please

Security issues pose obstacles to continued growth of online research

#### 74 On the line or on the screen

A focus group experiment tests remote moderating by telephone and video

### Columns

#### 16 Qualitatively Speaking

Sample selection as self-fulfilling prophecy

#### 18 Software Review

Ascribe from Language Logic

#### 106 Supplier Side

Managing the full-service sales force

### DEPARTMENTS

8 Survey Monitor

10 Names of Note

12 Product & Service Update

14 Research Industry News

98 Moderator MarketPlace

104 Index of Advertisers

105 Classified Ads

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: 952-854-6191; 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.

Copyright 2002 by Quirk's Marketing Research Review



# your customers talk to us worldwide

Australasia

Africa

Asia

Europe

America

## A one-stop marketing research agency for all your international surveys

- full service
- international staff
- worldwide activities supervised locally by PRP managers
- 130 CATI work-stations
- interviews in customers' native languages
- certified ISO 9001 International

Internet: [www.probert.com](http://www.probert.com)





*With dual cameras, on-site technicians,  
and multiple views,  
you'd swear you were there.*



**FocusVision video transmits the live focus group experience  
right to your office or home...without travel.**

The focus group experience is not simply "watching" a focus group. FocusVision captures all of the nuances and expressions, the all-important "immediate debrief" from your moderator, and a shared experience with your business associates.

Whether it's FocusVision Videoconferencing or Videostreaming, we have multiple cameras, picture-in-picture, plus live camera operators who get close-ups and full-group views.

With FocusVision you increase staff productivity, allow more people to view the groups and save the time, cost and hassle of travel.



**FocusVision™**  
WORLDWIDE, INC.

Call 1-800-433-8128

or e-mail: [info@focusvision.com](mailto:info@focusvision.com) to find out more.





**ARIZONA**

- Phoenix:*
- \* FIELDWORK PHOENIX, INC. - SOUTH MOUNTAIN
  - \* FIELDWORK PHOENIX, INC. SCOTTSDALE
  - \* FOCUS MARKET RESEARCH, INC. - GroupNet™
  - \* PLAZA RESEARCH-PHOENIX

**CALIFORNIA**

- Northern*
- San Francisco:*
- \* CONSUMER RESEARCH ASSOC./SUPERROOMS
  - \* ECKER & ASSOCIATES DOWNTOWN & SOUTH SAN FRANCISCO
  - \* FLEISCHMAN FIELD RESEARCH, INC.
  - \* NICHOLS RESEARCH, INC. - GroupNet™
  - \* PLAZA RESEARCH SAN FRANCISCO
- San Francisco (suburban):*
- \* NICHOLS RESEARCH, INC. - GroupNet™
- San Jose:*
- \* NICHOLS RESEARCH, INC. - GroupNet™
- Southern*
- Los Angeles*
- \* ADEPT CONSUMER TESTING, INC. - GroupNet™ BEVERLY HILLS
  - \* ADEPT CONSUMER TESTING, INC. - GroupNet™ ENCINO
  - \* ADLER-WEINER RESEARCH WESTWOOD
  - \* ASSISTANCE IN MARKETING L.A. FOCUS
  - \* MECZKA MARKETING RESEARCH CONSULTING MURRAY HILL CENTER WEST-SANTA MONICA
  - \* PLAZA RESEARCH LA
  - \* SAVITZ FIELD & FOCUS
  - \* SCHLESINGER ASSOCIATES
  - \* TROTTA ASSOCIATES MARINA DEL RAY
- L.A. Orange County*
- \* FIELDWORK, L.A., INC. - IN ORANGE COUNTY
  - \* TROTTA ASSOCIATES - IRVINE
- San Diego*
- \* LUTH RESEARCH, INC. SAN DIEGO
  - \* TAYLOR RESEARCH, INC. - GroupNet™

**COLORADO**

- Denver*
- \* ACCUDATA MARKET RESEARCH, INC. - GroupNet™
  - \* COLORADO MARKET RESEARCH
  - \* FIELDWORK DENVER, INC. INFORMATION RESEARCH
  - \* PLAZA DENVER

**CONNECTICUT**

- Danbury*
- \* MARKETVIEW
- Norwalk*
- \* NEW ENGLAND MARKETING RESEARCH
- Stamford*
- \* FOCUS FIRST AMERICA

**FLORIDA**

- Fort Lauderdale*
- \* PLAZA RESEARCH
  - \* WAC OF SOUTH FLORIDA, INC. - GroupNet™
- Jacksonville*
- \* IRWIN RESEARCH SERVICES

*Miami*

- \* NATIONAL OPINION RESEARCH SERVICES
- \* RIFE MARKET RESEARCH, INC.

*Orlando*

- \* SCHLESINGER ASSOCIATES

*Tampa*

- \* THE HERRON GROUP - GroupNet™ WESTSHORE BLVD.
- \* PLAZA RESEARCH - TAMPA
- \* SUPERIOR RESEARCH
- \* TAI-TAMPA BAY INC.

**GEORGIA**

- Atlanta*
- \* FIELDWORK ATLANTA, INC.
  - \* CENTER-ATLANTA
  - \* JACKSON ASSOCIATES, INC. - GroupNet™
  - \* JOHN STOLZBERG MARKET RESEARCH MURRAY HILL
  - \* PLAZA RESEARCH-ATLANTA
  - \* SCHLESINGER ASSOCIATES
  - \* SUPERIOR RESEARCH

**ILLINOIS**

- Chicago- Downtown*
- \* ADLER-WEINER RESEARCH
  - \* CHICAGO FOCUS
  - \* FOCUSCOPE, INC.
  - \* ILLINOIS CENTER MARKET RESEARCH
  - \* MURRAY HILL CENTER CENTRAL, INC.
  - \* NATIONAL DATA RESEARCH, INC. - GroupNet™
  - \* NATIONAL QUALITATIVE CENTERS
  - \* PLAZA RESEARCH CHICAGO
  - \* SAVITZ FIELD & FOCUS
  - \* SCHLESINGER ASSOCIATES
  - \* SMITH RESEARCH
- Chicago- Suburban*
- \* ASSISTANCE IN MARKETING DELVE(QCS)-OAK BROOK
  - \* FIELDWORK CHICAGO, INC. - NORTH
  - \* FIELDWORK CHICAGO-O'HARE, INC.
  - \* FIELDWORK CHICAGO, INC. - SCHAUMBURG
  - \* FOCUSCOPE, INC. - OAK PARK
  - \* NATIONAL DATA RESEARCH, INC. - GroupNet™ NORTHFIELD
  - \* OAKBROOK INTERVIEWING CENTER
  - \* O'HARE IN FOCUS-DES PLAINES
  - \* SMITH RESEARCH, INC. DEERFIELD

**INDIANA**

- Indianapolis*
- \* HERRON ASSOCIATES, INC. - GroupNet™

**KANSAS**

- Kansas City*
- \* THE FIELD HOUSE

**MARYLAND**

- Baltimore*
- \* BALTIMORE RESEARCH
  - \* CHESAPEAKE SURVEYS, INC. - GroupNet™
  - \* HOUSE MARKET RESEARCH

**MASSACHUSETTS**

- Boston- Downtown*
- \* BERNETT RESEARCH
  - \* BOSTON FIELD & FOCUS PERFORMANCE PLUS - GroupNet™
  - \* FOCUS ON BOSTON
  - \* FOCUS POINTE BOSTON NATIONAL QUALITATIVE CENTERS

*Boston- Suburban*

- \* BOSTON FIELD & FOCUS PERFORMANCE PLUS - GroupNet™ FRAMINGHAM
- \* FIELDWORK BOSTON, INC.
- \* FOCUS ON BOSTON-BRAINTREE NATIONAL FIELD & FOCUS-NATICK

**MICHIGAN**

- Detroit*
- \* MORPACE Int'l GroupNet™
  - \* SHIFRIN-HAYWORTH

**MINNESOTA**

- Minneapolis*
- \* FIELDWORK MINNEAPOLIS, INC.
  - \* FOCUS MARKET RESEARCH, INC. - GroupNet™
  - \* ORMAN GUIDANCE RSH.

**MISSOURI**

- St. Louis*
- \* DELVE(QCS)
  - \* PETERS MARKETING RESEARCH, INC.

**NEVADA**

- Las Vegas*
- \* LAS VEGAS SURVEYS

**NEW JERSEY**

- \* FIELDWORK EAST, INC. - FORT LEE
- \* FOCUS POINTE NORTH JERSEY-TEANECK
- \* GROUP DYNAMIICS-CHERRY HILL, INC. - GroupNet™
- \* VOORHEES
- \* MEADOWLANDS CONSUMER CENTER, INC.-SECAUCUS
- \* PETERS MARKETING RESEARCH, INC.
- \* PLAZA PARAMUS
- \* SCHLESINGER ASSOCIATES EDISON
- \* TAI - NEW JERSEY-TEANECK

**NEW YORK**

- New York City*
- \* FOCUS POINTE
  - \* FOCUS SUITES-NEW YORK
  - \* MURRAY HILL CENTER
  - \* NEW YORK FOCUS

- \* SCHLESINGER ASSOCIATES
  - \* WAC OF NEW YORK, INC. - GroupNet™
- New York-Suburban*
- \* FIELDWORK NY, INC. - WESTCHESTER
  - \* JRA: WHITE GLASS NY
  - \* THE LOOKING PLAINS-SYOSSET

**NORTH CAROLINA**

- Charlotte*
- \* LEIBOWITZ MARKET RESEARCH ASSOC., INC. - GroupNet™
- Raleigh*
- \* L & E RESEARCH

**OHIO**

- Cincinnati*
- \* ANSWER GROUP
  - \* MARKET INQUIRY
  - \* QFACT MARKETING RESEARCH, INC. - GroupNet™
- Cleveland*
- \* FOCUS GROUPS OF CLEVELAND
  - \* PAT HENRY CLEVELAND
- Columbus*
- \* DELVE(QCS)

**OREGON**

- Portland*
- \* CONSUMER OPINION SERVICES, INC. - GroupNet™

**PENNSYLVANIA**

- PHILADELPHIA- Downtown*
- \* FOCUS POINTE
  - \* JRA
  - \* SCHLESINGER ASSOCIATES
- Philadelphia-Suburban*
- \* FOCUS POINTE-BALA CYNWYD
  - \* FOCUS SUITES OF PHILADELPHIA GROUP DYNAMIICS IN FOCUS, INC. - BALA CYNWYD - GroupNet™
  - \* PLAZA RESEARCH-MALTON, NJ

**RHODE ISLAND**

- Providence*
- \* BOSTON FIELD & FOCUS PERFORMANCE PLUS - GroupNet™

**TENNESSEE**

- Memphis*
- \* ACCUDATA MARKET RESEARCH, INC. - GroupNet™

**TEXAS**

- Austin*
- \* TAMMADGE MARKET RESEARCH
- Dallas*
- \* CONSUMER RESEARCH ASSOC./SUPERROOMS DELVE(QCS)
  - \* FIELDWORK DALLAS, INC. - GroupNet™
  - \* MURRAY HILL CENTER
  - \* PLAZA RESEARCH DALLAS
  - \* SAVITZ FIELD & FOCUS
- Houston*
- \* COS RESEARCH, INC.
  - \* OPINIONS UNLIMITED, INC. - GroupNet™
  - \* PLAZA RESEARCH
  - \* SAVITZ FIELD & FOCUS

**VIRGINIA**

- Fairfax*
- \* METRO RESEARCH SERVICES, INC.

**WASHINGTON**

- Seattle*
- \* CONSUMER OPINION SERVICES, INC. - GroupNet™
  - \* FIELDWORK SEATTLE, INC.
  - \* GILMORE RESEARCH GROUP

**WASHINGTON DC**

- \* SHUGOLL RESEARCH, INC. - GroupNet™

**WISCONSIN**

- Milwaukee*
- \* LEIN/SPIEGELHOFF, INC.

**CANADA**

- Toronto*
- \* TORONTO FOCUS

\* Videostreaming also available

Plus 91+ International Facilities





## Grocery stores losing share of shopping trips

Consumers are shopping less frequently in traditional grocery stores, while they are increasing their trips to supercenters like Wal-Mart and dollar stores, according to the latest "channel blurring" study from Chicago-based ACNielsen U.S.



According to the study, supercenters and dollar stores are showing gains both in the percentage of households who shop in those channels and in the number of trips consumers take to them each year. The findings were based on an analysis of ACNielsen Homescan consumer panel data.

According to Todd Hale, senior vice president, consumer insights, ACNielsen U.S., "More than ever, grocery retailers have to create a unique reason for shoppers to choose them. The consumer has to associate the name on the store with something very positive and very different from the competition, whether it's the freshest produce, the best selection

## The truth about marriage

Have you ever hidden a price tag from your spouse? Suppressed a secret desire or just wished you weren't married anymore? With 40 percent of British marriages now heading for divorce, U.K. research firm MORI conducted a *Reader's Digest* Poll of married people, looking at their attitudes towards marriage, their experiences, and how honest and open they are with each other. MORI interviewed 971 married adults aged 16 years and over throughout Great Britain.



Some of the poll's greatest surprises arose from conversations married people wish they could have but don't, especially younger men: 44 percent of men under 45 wish they could talk to their partner about having more fun; 40 percent of men under 45 wish they could talk to their partner about spending more time together; 29 percent of men under 45 wish they could talk about their sex lives, compared with 17 percent of women; 22 percent of men under 45

wish they could ask their partner to be more affectionate.

The seven-year itch is fact not fiction: 30 percent of people married between six and nine years confess that they've wished they could wake up one morning and not be married anymore; 30 percent of men married for nine years or less wish they could talk about their sex lives —

compared with 12 percent of women. What are our most-kept secrets? Money is a major taboo area — one in five of those who have been married for 20-29 years have no idea how much their spouse has saved or invested or even how much their partner earns; 44 percent of women and 39 percent of men confess they have kept something secret from their partners.

Over a quarter (27 percent) of married people say that given their experience, they would not get married again. Nearly one in five (18 percent) admit they have at some point had dreams or aspirations they do not talk about with their spouse.

more with their frequent shopper databases to segment their customers and to develop strategies around each

holds still shop in traditional grocery stores, but the annual number of trips households make to such stores is continuing to decline. At the same time, both supercenters and dollar stores have shown strong gains in household penetration and smaller gains in annual trips.

Among supercenters, Wal-Mart has been especially successful at converting grocery-store customers to Wal-Mart customers. An analysis of ACNielsen Wal-Mart Channel Service data shows much of the retailer's supercenter sales growth coming from traditional grocery-store shoppers. While 7 percent of 2001

Channel	Household Penetration (%)				Trips Per Year			
	1998	1999	2000	2001	1998	1999	2000	2001
Grocery	100	100	100	100	85	83	78	75
Mass Merchandise	94	95	94	93	28	26	25	23
Drug	86	87	86	86	15	15	15	15
Supercenter	47	52	54	63	14	15	17	18
Dollar	47	52	55	59	9	10	10	11
Warehouse	49	50	49	50	9	9	10	10
Convenience/Gas	52	50	48	45	13	13	14	15

Source: ACNielsen Homescan 52 weeks ending 12/29/01

of seafood, or the most interesting and convenient-to-purchase prepared meals. Retailers could be doing much

segment to grow their overall business."

As the chart shows, all U.S. house-

continued on p. 86





# FOCUS ON YOUR MARKET

COMPLETE FOCUS GROUP FACILITIES  
CONSUMER, EXECUTIVE, AND MEDICAL RECRUITING  
ONLINE FOCUS GROUPS  
CENTRAL LOCATION TESTS  
MOCK JURIES  
WEBSITE USABILITY TESTING

CENTRAL LOCATION INTERVIEWING  
INTERCEPT INTERVIEWING  
PRODUCT AND TASTE TESTS

STORE AUDITS  
IN-STORE MERCHANDISING AND DISTRIBUTION  
MYSTERY SHOPPING PROGRAMS  
COUPONING AND DEMONSTRATIONS



**NEW JERSEY**  
PHONE 732-906-1122  
FAX 732-906-8792

**NEW YORK**  
PHONE 212-730-6400  
FAX 212-730-0853

**ORLANDO**  
PHONE 407-660-1808  
FAX 407-660-0225

**LOS ANGELES**  
PHONE 323-876-9909  
FAX 323-876-9884

**ATLANTA**  
PHONE 770-396-8700  
FAX 770-396-8753

**PHILADELPHIA**  
PHONE 215-564-7300  
FAX 215-564-5161

**CHICAGO**  
PHONE 312-587-8100  
FAX 312-587-8400

CALL US TOLL FREE AT 866-549-3500  
[www.SchlesingerAssociates.com](http://www.SchlesingerAssociates.com)



# Names of Note

**Lou Roth**, president and owner of The Wats Room, a Rochelle Park, N.J., research firm, passed away on May 30th. He is survived by his wife Francine, son Richard, daughter Jennifer Paulson and a grandchild. The Wats Room will continue under the direction of Vice President Arlene Harris.

**Thomas Pauschert** has become a member of the management team of the *ENIGMA-Institut für Markt- und Sozialforschung* (Institute of Market and Social Research), Wiesbaden, Germany.

*Common Knowledge Research Services*, Dallas, has named **Scott Prueter** to its sales staff as senior account manager.

**Arthur Redmond** has been named senior vice president, strategic marketing and consumer insights, at *Aetna*, a Hartford, Conn., insurance firm.

**Ed Sugar** has been named vice president of *Irwin Research Services*, Van Nuys, Calif.

**Jesús Cámara** has been named managing director of the newly-opened *INNER BILBAO*, Bilbao, Spain. **Begoña Armas** has been named his assistant.

**Diana Donnelly** and **Joan Stelzer** have joined New York-based research



Donnelly

Stelzer

firm *Ziment* as director of client service.

**Ralf Bieler** has been named executive vice president of *Landis Strategy & Innovation*, a Palm Beach Gardens, Fla., research firm. The firm has also named *Louise Francoeur* as research consultant.

*SPSSMR*, Chicago, has named **David Biernbaum** national accounts director North America and **Marc Thornton**

senior account executive, West.

**Helena Chari** has been named managing director of *TNS ICAP A.E.*, the new joint venture between Taylor Nelson Sofres and Greece-based information and consulting services company *ICAP A.E.*

*Strategic Marketing Corporation*, a Bala Cynwyd, Pa., research firm, has



Kindig

named **Lisa Kindig** vice president of its Qualitative Institute.

*Millward Brown* has added to its North American staff, naming **Gordon Wyner** executive vice president of North American strategy and **Mary Ann Packer** executive vice president, chief client and marketing officer. In addition, **Wendy Matney** has been named director, business development for the Western U.S. She will be based in the Austin, Texas office. In the New York office, **Greg dePalma** has been promoted to director, business development for the Eastern U.S. In Detroit, **Peter Teachman** has been promoted to vice president. In the Melbourne, Australia office, **Maria Vallis** has been promoted to group account director and **Simon Rowell** has been promoted to manager - business development. **Dominic Twose**, previously account director for *Millward Brown U.K.*, has been appointed knowledge manager for Europe, Africa, India and the Middle East.

**Laura Schmidt** has been promoted to vice president of *Super Group*, a division of *Research International*, Chicago.

We've spent more than two decades advising our clients about research strategies to help them skillfully advance their organizations.

Let us help you anticipate your next move.



**Market Probe**  
www.marketprobe.com

- ▲ Customer Satisfaction Measurement & Loyalty
- ▲ Employee Commitment
- ▲ Brand Health Management
- ▲ Custom Research & Consulting





93.6% of hospital nurses  
would like to see improved  
splashguards on bedpans.

## If there's a niche, we'll discover it.

There's a world of information out there, and no one can put it in your hands more quickly and economically than Discovery Research Group. Our reliable reputation in telephone data collection is credited to our project directors who proactively manage each assignment, and our interviewers, whose professional approach and neutral accents equate to lower refusal rates.

And with toll-free numbers for inbound responses, our system is uniquely equipped to interview professionals at their convenience. Just one more way DRG is working smarter... so you get the data you need to make savvy business decisions.

**DISCOVERY**  
RESEARCH GROUP

Call 888-233-0679 or visit <http://discoverit.drgutah.com>



## FIRM updates Confirmit

FIRM, Inc., New York, has released Confirmit 7.0, an updated version of its Web survey and feedback application. Built on Microsoft's .NET technology, Confirmit 7.0 uses XML Web services, allowing it to integrate with almost any enterprise system, and allowing Confirmit operations to be performed from remote applications.

Accessible from any computing device, platform, or application, Confirmit 7.0 can be configured to provide customized functionality. Features include the ability to: automate real-time feedback triggered by customer or employee behavior, acting as an alert system for potential dissatisfaction so that specific action can be taken immediately; and automate continuous and ongoing research projects, as well as report delivery. Additionally, the product includes a new survey wizard through which users can create questionnaires and reports in four steps, and a new respondent interface that includes several new features allowing users to create customized Web surveys. For more information visit [www.confirmit.com](http://www.confirmit.com).

## Cust sat system for telecom firms

Corvallis, Ore.-based CAMO and Telemark, a U.K. telecommunications consulting company, have formed a partnership to offer a customer satisfaction and competitive intelligence system to telecommunications firms. The Telemark-CAMO system provides network operators and equipment providers access to analysis of client opinion, from their desktop, as compared against independent industry standards of performance and the Telemark Gold Standard.

Telemark plans to offer the system to compare regional and country satisfaction data against both local and global benchmarks and the industry standard of performance. These

benchmarks help telecommunications enterprises assess whether they are perceived as best-in-class and/or world-class in any particular country, region, sector or segment of the market they chose to examine in detail. The decision support environment can be customized to a telecommunications company's particular requirements. For more information visit [www.camo.com](http://www.camo.com) or [www.telemark.uk.com](http://www.telemark.uk.com).

## Nationally projectable online poll launched

Leflein Associates, a Fort Lee, N.J., market research firm, has launched the National Survey Institute (NSI) Poll, an online poll projectable to the entire U.S. population. The national omnibus of 1,000 adults, taken weekly, combines the resources of Knowledge Networks and Leflein Associates.

The NSI Poll uses the Knowledge Networks' panel, which is comprised of a random sample of all Americans, including non-Internet households. Panelists receive a custom-designed MSN TV so that anyone with a telephone can be represented.

Additionally, the NSI Poll has the ability to show respondents multimedia effects (print, audio, video) with uniform broadcast quality. Because respondents are provided with an MSN TV, these consistent images are viewed in the respondent's home setting. For more information call Jessica Hawken at 201-363-1661 or visit [www.NSIPoll.com](http://www.NSIPoll.com).

## Acxiom debuts segmentation system

Little Rock, Ark.-based Acxiom Corporation has released Personix, a household-level segmentation system that places each U.S. household into one of 70 life stage segments, based on its specific consumer and demographic characteristics, allowing a greater

precision of targeted marketing and true accuracy of segmentation. Personix builds its segmentation approach on life stages based on the principle that households' consumer behaviors are reflected in their shared life stage and similar socio-economic characteristics.

Information is updated at least twice each quarter. Personix is applied at the household level and not at a block group or larger, so it is designed to provide a higher level of precision for the user.


Personix is applied to a company's customer data for analysis. The analysis provides a common framework to view customers across a company's product mix and its organization. Personix connects to syndicated survey data such as the Simmons National Consumer Survey, giving marketers information on everything from shopping and media preferences to financial products and other services. For more information visit [www.acxiom.com/personix](http://www.acxiom.com/personix).

## Receive mystery shopping reports via the Web

Ann Arbor, Mich., mystery shopping firm Second To None has launched Catapult, a Web-based client reporting solution that gives clients real-time access to customer feedback. Catapult recognizes each user and displays a personalized dashboard highlighting their personal and most frequently run reports. Users may select a report from a menu of choices, customize it to their unique criteria, and view it in HTML, PDF, a chart, or directly download the results to Excel or other data analysis programs on their desktop. Users too busy to be bothered by running reports can select a subscription service in which results are compiled and e-mailed to them. For more information

continued on p. 94





**Online Research**

# Proven.

**The GREATEST Reach.**

*Access to more than 90 million people*

**The BEST Technology.**

*Award winning technology that  
has been the backbone for more than  
5,000,000 completed surveys*

**The MOST Market Research Expertise.**

*A 55-year heritage of providing  
research solutions*

Proven Company.

Proven Methodologies.

Your Research for the Right Decision.

**insightexpress**   
*Research for the Right Decision*

1-877-329-1552 • [info@insightexpress.com](mailto:info@insightexpress.com)

**Better. Faster. More Affordable.**

*Make the decision to replace traditional with  
online methods today.*

*Learn how in our FREE white paper:*

***[www.insightexpress.com/proven](http://www.insightexpress.com/proven)***



## News notes

**NetRatings, Inc.**, Milpitas, Calif., and **Jupiter Media Metrix, Inc.**, New York, jointly announced that they have settled Jupiter Media Metrix's pending patent infringement case against NetRatings. In a separate transaction, NetRatings has acquired Jupiter Media Metrix's contracts for European Internet audience measurement and certain related assets for \$2 million in cash.

The patent infringement case settlement provides for the dismissal with prejudice of the litigation and a \$15 million payment by NetRatings to Jupiter Media Metrix. Under the terms of the settlement, NetRatings has acquired Jupiter Media Metrix's patents for computer use tracking (United States Patent Nos. 6,115,680 and 5,675,510), and granted Jupiter Media Metrix a non-exclusive, assignable license to use the patented technology in its domestic Internet audience measurement business until June 30, 2005.

The license fee payable to NetRatings will be \$125,000 per month for the period July 1 through September 30, 2002, and \$375,000 for the fourth quarter 2002. For 2003, 2004 and the period of January 1 through June 30, 2005, the annual fee, payable quarterly, will be \$1.5 million, \$1.75 million and \$1 million, respectively.

In addition, as part of the settlement, Jupiter Media Metrix has granted NetRatings a perpetual non-exclusive royalty-free license in certain proprietary software associated with the utilization of the patented technology.

Portland, Ore.-based **Research Data Design, Inc.** (RDD) has closed \$2 million in its first round of strategic funding. RDD will use the funds to expand capacity at its market research centers, acquire additional facilities, build its sales team, and

enhance its marketing efforts.

VNU is expanding the Nielsen brand name to all international markets and also linking the brand to the company's global entertainment information businesses. The branding initiative will be a three-step process. First, Nielsen Media Research in the U.S. will be united with ACNielsen Media International in 40 countries under the brand name Nielsen Media Research. Second, the Nielsen name will also be co-branded with VNU's entertainment information businesses under the Nielsen Entertainment umbrella, including ACNielsen EDI (to become Nielsen EDI), The National Research Group (Nielsen NRG), VideoScan (Nielsen VideoScan), SoundScan (Nielsen SoundScan), BookScan (Nielsen BookScan), Broadcast Data Systems

(Nielsen BDS), Entertainment Marketing Solutions (Nielsen EMS), and ACNielsen ReelResearch (Nielsen ReelResearch). Third, a new Nielsen visual identity/signature will be introduced as part of the re-branding initiative.

## Acquisitions

Milpitas, Calif.-based **NetRatings, Inc.** has acquired New York-based **DoubleClick Inc.**'s @plan products and formed a strategic multi-year research partnership that provides for the integration of Nielsen//NetRatings and @plan research data into DoubleClick's ad management products and services. Under the data license and integration agreement, Nielsen//NetRatings and @plan research will be integrated into DoubleClick's DART and MediaVisor

continued on p. 80



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](http://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](http://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>.

The American Marketing Association (AMA) will hold a con-

ference on applied research methods on October 15-18 at the New Orleans Hyatt. For more information visit [www.marketingpower.com](http://www.marketingpower.com).

The European Society for Opinion and Marketing Research (ESOMAR) will hold a conference on telecommunications research on October 20-22 in Oslo, Norway. For more information visit [www.esomar.nl](http://www.esomar.nl).

The Council of American Survey Research Organizations (CASRO) will hold its annual conference on October 23-25 at the Sheraton El Conquistador, Tucson, Ariz. For more information visit [www.casro.org](http://www.casro.org).

The 2002 Research Show will be held October 1-3 at the Olympia Exhibition Centre, London. For more information visit [www.marketresearchshow.com](http://www.marketresearchshow.com).



## News spotlight

### European research alliance created

The European Society for Opinion and Marketing Research (ESOMAR) and the European Federation of Associations of Market Research Organizations (EFAMRO) have decided to create the European Marketing Research Alliance (EMRA).

The key objective of the initiative is to protect the value of marketing and opinion research in Europe by lobbying against legislation hindering the research process and also promoting legislation that ensures respect is maintained for individual privacy.

The EMRA will represent industry interests at the European level and will, where necessary, support national organizations for marketing and opinion research at a local level. Main activities will, among others, be to monitor potentially restrictive legislation in the EU member states and to develop effective responses and also to

promote the benefits of market research to the consumer and society.

As legislation and privacy issues increasingly become global, sharing effective know-how with organizations in other regions such as the U.S. under the umbrella of the Global Legislative Initiative, established earlier this year, will be a key component of EMRA activity.

ESOMAR and EFAMRO have reached an agreement with the World Federation of Advertisers (WFA) in Brussels on sharing certain WFA resources and support from outside professional agencies and specialists.

This will guarantee cost-effectiveness, speed, and quality of response in representation activities. At the moment, ESOMAR and EFAMRO are in the process of finalizing the terms of reference of the EMRA. An executive board will be set up to oversee the EMRA. Also a legal committee for day-to-day activity management will be created as well as a funding committee. ESOMAR will provide financial support for the initial phases of the

program. A detailed activity plan will be made available in September.

"This effort is of paramount importance for the profession," says John Kelly, ESOMAR president. "Effective legislative representation and promoting high standards of performance are some of the cornerstones of ESOMAR's mission. I appreciate the cooperation with the WFA. Our focus might be different in a number of areas. However we share the commitment to freedom for information, self regulation, and professionalism worldwide."

Earlier this year, world leaders at the research summit in Geneva (RELEAS) agreed to establish a global legislation initiative. Building capability in Europe was identified as a key priority. As a further indication of the global importance, the U.S.-based Council for Marketing and Opinion Research recently held discussions with organizations in both Mexico and Canada and they will be creating a North American capability. This will also be well-coordinated with the EMRA.

## *diverse* It's a ~~small~~ world...

Work with a full-service research firm that explores, understands and answers the diverse cultural and linguistic questions that are vital to the design, execution and analysis of every project.

## Domestic and International Qualitative and Quantitative Research

(Hispanic, Asian, African American, Native American and General Market)



**Erlich Transcultural Consultants**

21241 Ventura Boulevard, Suite 193

Woodland Hills, CA 91364

Ph: 818/226-1333 Fax: 818/226-1338

Email: [info@etcethnic.com](mailto:info@etcethnic.com) Web: [www.etcethnic.com](http://www.etcethnic.com)





# Qualitatively Speaking

## *Sample selection as self-fulfilling prophecy*

By Nino DeNicola

*Editor's note: Nino DeNicola is president of Dialogue Resource, a Fairfield, Conn., research company. He can be reached at 203-256-9211.*

**P**ardon my whining, but can we at least agree on this: In marketing research, sample definition should reflect the market for the sponsoring company's existing or planned product or service. OK? Fine.

Reasonable people — and you, reader, seem reasonable enough (so far) — might further agree that, unless we're talking, consciously and for cause, about a specifically targeted sub-segment, the "market" consists of all those individuals who use, or plausibly could use, the product or service at issue. OK? Fine.

Accordingly, in recruiting, say, a series of focus groups, once past the standard exclusions for security/confidentiality and recent past participation, the principal objective is to ensure that candidates are in fact present or potential users of the subject offering. Subsequent screening questions might fine-tune the groups' composition on a number of relevant secondary variables — age, gender, region, use-frequency,

brand preference, etc. OK? Fine.

Why is it, then, that all of us qualitative research practitioners have found ourselves on any number of occasions harangued by client observers of focus groups or depth interviews, who complain about screening and sample selection on the grounds that the respondents failed to react favorably to the test stimulus — product, concept, advertisement, whatever.

### **A case in point**

In a study having to do with a well-known clothing brand's potential extension into men's ready-made suits, one participant after another rejected the offering, clearly and for cause. In each case, the "point man" among the client observers remarked, "That's not our target customer," and scoured the individual's screener in a (futile) search for a rationale. Finally, one participant allowed as how it wasn't such a bad idea, and that, with certain provisos, he might even consider trying one of the suits. "There!" exclaimed the client, "That's our customer!" Since there were no meaningful screening differences between this marginal acceptor and all the rejectors, it's difficult to

escape the conclusion that the client was defining his target market as "those consumers who approve of my offering." In this way, it's possible for a manager to claim 100 percent market acceptance of an offering headed for certain failure.

From the standpoint of strategic business growth planning, the circular logic described above is wrongheaded in two major ways:

- **Wasted effort.** First, if an offering is intrinsically unpromising — that is, fundamentally flawed in one or another way, a bad idea — then the determined cherry-picking of the relatively few and scattered acceptors while discounting the legions of rejectors-for-cause could obscure the basic unviability of the enterprise until well along in the development process, after a sizable (and unwise) investment of resources.

- **Lost opportunity.** Second, and perhaps even more important in today's competitive environment, is the lost opportunity. Let's say the offering is intrinsically sound — that is, potentially appealing to a target market

continued on p. 97





15

# Marketing Systems Group

celebrates 15 years of excellence  
serving the Market and Survey Research Industries.  
Thank you for your support.

We look forward to the next 15 years of  
**Leadership Through Innovation.**



800.336.7674  
[www.m-s-g.com](http://www.m-s-g.com)



Philadelphia, PA • Lincoln, NE • St. Louis, MO • Research Triangle, NC • Los Angeles, CA



# Software Review

## *Ascribe from Language Logic*

By Tim Macer

*Editor's note: Tim Macer is a U.K.-based independent specialist and adviser in the use of technology for survey research. He can be reached at [tim@macer.com](mailto:tim@macer.com). For more information visit [www.macer.com](http://www.macer.com).*

**C**oding verbatim responses is a bit like doing the dishes after hosting a dinner party: a somewhat tedious and time-consuming experience, but ultimately satisfying when you see the results stacked neatly away, ready for use later. At least, that was the case before dishwashers became commonplace. Spectacularly successful though CATI has been down the years, the technology for handling all the open-ends that pile up after the party is over is still stuck in the suds-and-scrub era.

After interviewing, coding open-ends is often one of the costliest parts of the overall process. One agency

that runs a weekly omnibus estimates the total cost of asking an open-ended question is 20 times higher than asking a similar closed question. This is not always a cost that agencies can pass on in full.

Fast-forward to Web-based interviewing, and the cost gulf widens. It costs virtually nothing to collect 10,000 completes, but a small fortune to code all the "other specifics" and "Tell me what you..." questions that go with them. Not surprisingly, it is from the Web that a superb idea comes that could rid coding of its kitchen sink associations for ever.

Ascribe is a Web-based verbatim management system from Language Logic that allows coders, coding supervisors, researchers, and even end-clients to work with open-ended responses from research projects, and with each other, to achieve perfectly coded data in less time and without

the effort. It works equally well across all interviewing modes, and has several users that swear by it for paper-based studies.

To get your surveys into Ascribe you need to go through a "load" process to import the verbatim responses. You can also import some other "closed" data. Ascribe is not an analysis package as such, though it does contain some surprisingly advanced analytical capabilities (more on that later). So, at the other end, the data must be exported in such a way that they can be tied into the rest of the data for the survey. The ease or difficulty of these stages depends largely on the different packages being used upstream or downstream. As Language Logic has entered into a sales partnership relationship with SPSS MR, there is particularly good integration with the SPSS family of products.

One clever feature of the load process is something Language Logic calls "incremental loading" that lets you upload data from your CATI or Web survey package on a daily basis.

continued on p. 84

### **Ascribe verbatim-coding software, from Language Logic ([www.languagelogic.net](http://www.languagelogic.net))**

#### **Pros**

- Very fast, productive and enjoyable way to code
- Allows coders to work from home
- Analyze and view actual verbatim responses directly from crosstabs

#### **Cons**

- Import process can be tedious
- Some issues relating to coding combined open/closed questions
- Care needed when several users work together on same study





**M O R E   T H A N   M E A S U R E M E N T<sup>®</sup>  
U N D E R S T A N D I N G   T H E   O N L I N E  
C U S T O M E R   E X P E R I E N C E .**

Maritz Research introduces MindAbility™, the newest product in our portfolio of online research solutions.

MindAbility is a Web site usability testing tool that gives you a complete picture of how respondents interact with your site in their own environment, allowing you to combine the depth of qualitative feedback with quantitative usability results.

The MindAbility software records the respondent's online navigation pattern from start to finish. Our interactive reporting systems allow for rapid review of results so you can see problems or opportunities and make crucial decisions quickly.

By understanding the customer experience and improving your site's functionality, you can increase browser-to-buyer conversion rates, improve brand equity, increase rates of customer acquisition and retention, or even improve your competitive positioning.

As one of the largest customer satisfaction specialists in the world, Maritz Research brings its expertise in customer feedback and measurement to your Web site. Let us help you make the most out of your online presence. Call us today at **1-800-446-1690** or visit **[www.mindability.com](http://www.mindability.com)**.



**MARITZ RESEARCH**

[www.maritzresearch.com](http://www.maritzresearch.com)





# If given the choice

By John Allison and Chris O' Konis

*Fidelity Investments  
finds respondents  
like phone-Web  
survey option*



*Editor's note: John Allison is director of market research for Fidelity Employer Services Company. He can be reached at john.allison.fesco@fmr.com. Chris O'Konis is manager of Web analysis for Fidelity eBusiness. He can be reached at chris.o'konis@fmr.com.*

**W**hen advantages of online research are discussed, emphasis is usually placed on cost and improved turnaround time compared to more traditional research methods. The fact that people with Internet access prefer to take Web surveys is often swept aside as simply an additional consideration.

Marketing researchers, however, should take a hard look at their relationships with survey respondents. As industry-wide refusal rates continue to rise — particularly for those utilizing traditional telephone contacts — researchers need to think about creative ways to improve the survey experience for their important customers and potential customers. Too often, inflexible uni-modal research designs are employed. By incorporating the option of taking surveys online into research programs, researchers can start to rebuild trust and goodwill with respondents.

In 2001, Boston-based Fidelity Investments, in conjunction with Burke Customer Satisfaction Associates, Cincinnati, experimented with giving users of its NetBenefits Web site a choice of how to respond to a survey about its features and functionality. After being contacted on the telephone, site users were given the option of instead taking the survey over the Web. The experiment proved to be such a success that Fidelity repeated the design for a follow-up study early this year and has also employed multi-mode research successfully for other studies, including with business populations.

Many have expressed concerns

about such multi-mode survey approaches — particularly with regard to different response patterns that could potentially result from an interviewer-administered method, such as phone surveying, and a self-administered method, such as using Web questionnaires. Indeed, some methodological differences did emerge when Fidelity compared results from phone and Web surveys.

Such methodological differences do not, however, invalidate the approach. By understanding these differences, it is possible to put results into the proper context and make appropriate wave-to-wave comparisons as the percentages of survey takers using the phone and Web shift.

#### Choosing a method

The NetBenefits Web site, an offering of the Fidelity Investments Institutional Retirement Group, lets three million participants access and manage their employee benefit account information.

When compared to competitive Web sites, Fidelity's NetBenefits offering had received high rankings from key evaluators. Until 2001, however, no proprietary research had been conducted that surveyed users from all of the Institutional Retirement Group's business units — including those serving client companies with a variety of defined contribution plans, defined benefit plans, health and welfare policies, and payroll services. Fidelity therefore commissioned a study to create benchmark measures of customer satisfaction and better understand usage patterns of recent NetBenefits site visitors.

When choosing a methodology for the study, Fidelity faced some important constraints. Because Fidelity had not focused on capturing e-mail addresses when compiling retirement customer data, it could not pursue an online-only survey format, as it

would not have reached a representative sample by sending out e-mail invitations only. Agreements with some client companies also restricted surveying that could take place with their employees, making a random Web site intercept problematic. Furthermore, findings from Web site intercept approaches would probably have overemphasized views of frequent users, who might have been more likely to see the survey invitation and respond.

#### A matter of trust

Fidelity was, however, able to obtain phone numbers of recent users of the NetBenefits site who were eligible for surveying. A traditional telephone study certainly would have been possible. The issue of trust loomed, however. Being called at home and asked to participate in a survey about a financial relationship — even a recognized relationship with Fidelity — is daunting to many. The authenticity of survey sponsorship is much easier for a contact to ascertain on a Web questionnaire than over the phone. In the telephone case, customers are at the mercy of quick introductions (to which they are likely not paying full attention) from unknown and unsolicited callers, often at inopportune times. In the online instance, the customer sees a tangible, written computer screen clearly identifying the survey sponsor and vendor — in addition to an invitation e-mail explaining the study's purpose and how the contact was targeted for participation.

#### A Web-savvy population

Researchers at Fidelity thought that giving potential respondents an online survey option would give them more time to consider whether to participate and, it was hoped, reduce non-response bias that might have occurred with a telephone-only

continued on p. 88



# The need for speed

*Time-savings as a competitive  
distinction for online research*

by Bill MacElroy

*Editor's note: Bill MacElroy is president of Socratic Technologies, Inc., a San Francisco research firm. He can be reached at [bill.macelroy@sotech.com](mailto:bill.macelroy@sotech.com).*

**"T**ime flies when you're having fun." This popular expression helps to illustrate one of the competitive distinctions for online research. In fact, respondent feedback from recent surveys indicates that the online environment has speed-based advantages and other elements that make a survey seem like less work.

We started several years ago looking at the respondents' perceptions of time needed to participate in surveys. At first, we weren't setting out to study time per se, but rather to understand why people weren't taking part in surveys as much as they used to. They said one of the key reasons was that the (telephone and mail) surveys themselves were boring. Since research and questionnaire design itself hasn't changed much in the past 30 years, the fact that surveys were suddenly becoming more boring and oppressive led us to believe that something must have changed for the respondents. That something seems to be a phenomenon discussed in many popular press articles: time compression.

Time compression is usually described as the feeling that one has more and more to do in a shrinking amount of time. Consumer studies have noted that lack of time is a key barrier that limits the consumption patterns of many products. Things that were never considered to be in the same competitive space are now locked in mortal combat for the time to simply consume a good or service. The same intense competition for a person's time now applies to survey participation as an activity. In short, the "opportunity" to participate in surveys (particularly for free) is becoming a weak competitor for the respondent's free time.

One aspect of online surveys that helps them compete with other pur-



# Web Surveys

Imagination

DRC translates leading-edge technology into easier, faster, and better solutions for your survey programs. With 20 years of survey and technology experience, DRC is uniquely qualified as a premier provider of large-scale Web surveys.

Our easy-access Web surveys and large-volume online reporting put your customers' and employees' opinions at your fingertips. With up-to-the-minute reporting you have everything you need to make decisions that benefit your bottom line.

DRC's Web technology is backed by full-service research and process consulting for seamless execution of your survey project. The results are extraordinary.



800.826.2368

www.datarecognitioncorp.com



Geoff Davis,  
Webmaster

DATA RECOGNITION  
**DRC**  
CORPORATION

Strengthening partnerships between your organization, your customers, and your employees.

Customer Satisfaction Surveys • Employee Surveys • 360° Feedback • Web Surveys and Reports • Research Consulting



suits is that online surveys are, in fact, less time-consuming than other types of traditional research methods. An online survey can be 35 percent to 40 percent quicker than a spoken, telephone survey of the identical number of questions. Many people who have been raised within a computing environment now also type up to one-and-a-half times as fast as they can write a sentence or thought of similar complexity. Spelling anxiety (which also tends to slow down handwritten communications) seems to be less worrisome to online typists. (We have seen that this is not true of online chat-type research, in which spelling anxiety tends to produce short, staccato answers that consist of small, easy-to-spell words.)

When online surveying was brand new (five to six years ago) participation rates were huge (50 percent to 60 percent) compared to telephone/mail. Although that rate has dropped (25 percent to 30 percent), it is still many times that of traditional methodologies. Part of the high initial response rates no doubt had to do with the novelty factor that accompanies any new channel of communication. But of course, novelty wears off (until the next new thing); so the drop-off from the initial rates is not surprising. But what keeps the rates so high even after everyone is now doing online surveys? Another element of the puzzle has to do with time selectivity.

When asked, respondents with online capabilities are far more likely to express a preference for online survey participation. A frequently recorded reason for this preference is "because I can do the survey when I want to." For example, many respondents choose to do business-related surveys from home during the evenings and weekends. Similarly, considerable frustration is building toward intrusive contacts, including the use of unsolicited phone surveying. Being able to choose the time of the survey also tips the scale of respondent preference toward the online delivery system. Interestingly, a very good time period for online survey work (versus phone) is over long holiday weekends. (What do you do when

## VideoMarker™ is available at the following facilities:

**Many New Facilities!**

### ARIZONA

#### Phoenix:

- Fieldwork Phoenix-South Mountain
- Plaza Research

#### Scottsdale:

- Fieldwork Phoenix-Scottsdale

### CALIFORNIA (Northern)

#### San Francisco:

- Consumer Research Associates-Superrooms
- Ecker and Associates-Downtown
- Ecker and Associates-South San Francisco
- Fleischman Field Research
- Nichols Research, Inc.-GroupNet™
- Plaza Research

#### San Jose:

- Nichols Research, Inc.-GroupNet™

### CALIFORNIA (Southern)

#### Los Angeles:

- Adept Consumer Testing Inc.-GroupNet-Beverly Hills
- Adept Consumer Testing Inc.-GroupNet-Encino
- Adler-Weiner Research-Westwood
- Plaza Research
- Schlesinger Associates
- Trotta Associates-Marina Del Rey

#### L.A. Orange County:

- Fieldwork Los Angeles

#### San Diego:

- Luth Research
- Taylor Research-GroupNet™

### COLORADO

#### Denver:

- Fieldwork Denver
- Plaza Research

### CONNECTICUT

#### Stamford:

- Focus First America

### FLORIDA

#### Ft. Lauderdale:

- Plaza Research

#### Miami:

- National Opinion Research Services
- Rife Market Research, Inc

#### Orlando:

- Schlesinger Associates

#### Tampa:

- Plaza Research
- TAI - Tampa Bay

### GEORGIA

#### Atlanta:

- Fieldwork Atlanta
- Jackson Associates, Inc.-GroupNet™
- Plaza Research
- Schlesinger Associates

### ILLINOIS

#### Chicago-Downtown:

- Adler-Weiner Research
- Fieldwork Chicago-O'Hare
- Murray Hill Center
- National Data Research, Inc.-GroupNet™
- Plaza Research
- Schlesinger Associates
- Smith Research

#### Chicago-Suburban:

- Fieldwork Chicago-North
- Fieldwork Chicago-Shaumburg
- National Data Research, Inc.-GroupNet
- Smith Research-Deerfield

### MARYLAND

#### Baltimore:

- House Market Research
- The Baltimore Research Agency

### MASSACHUSETTS

#### Boston-Downtown:

- Bennett Research
- Boston Field and Focus
- Performance Plus-GroupNet™
- Focus on Boston
- Focus Pointe Boston

#### Boston-Suburban:

- Fieldwork Waltham
- Focus on Boston - Braintree

### MINNESOTA

#### Minneapolis:

- Fieldwork Minneapolis

### MISSOURI

#### St. Louis:

- Peters Marketing Research

### NEW JERSEY

#### Edison:

- Schlesinger Associates

#### Fort Lee:

- Fieldwork East

#### Paramus:

- Plaza Research

#### Parsippany:

- Peters Marketing Research

#### Secaucus:

- Meadowlands Consumer Center Inc.

#### Teaneck:

- TAI-Teaneck

### NEW YORK

#### New York City:

- Focus Pointe-New York
- Focus Suites-New York
- Schlesinger Associates
- WAC-GroupNet™

#### New York-Suburban:

- Fieldwork NY-Westchester
- JRA Research, Inc.-White Plains
- The Looking Glass-Syosset

### NORTH CAROLINA

#### Charlotte:

- Liebowitz Market Research Associates, Inc.-GroupNet™

#### Raleigh:

- L & E Research

### OHIO

#### Cincinnati:

- QFact Marketing Research, Inc.-GroupNet™

#### Cleveland:

- Focus Groups of Cleveland

### PENNSYLVANIA

#### Philadelphia-Downtown:

- Focus Pointe
- JRA
- Schlesinger Associates

#### Philadelphia-Suburban:

- Focus Pointe-Bala Cynwyd
- Focus Suites of Philadelphia - Bala Cynwyd
- Group Dynamics In Focus, Inc.-GroupNet™ - Bala Cynwyd
- Plaza Research - Marlton, NJ

### TENNESSEE

#### Memphis:

- Accudata Market Research, Inc.-GroupNet™

### TEXAS

#### Dallas:

- Consumer Research Associates/Superrooms
- Fieldwork Dallas
- Plaza Research
- Savitz Research Center

#### Houston:

- CQS Research
- Opinions Unlimited
- Plaza Research
- Savitz Field & Focus

### VIRGINIA

#### Fairfax:

- Metro Research Services, Inc.

### WASHINGTON

#### Seattle:

- Fieldwork Seattle

### WASHINGTON, DC

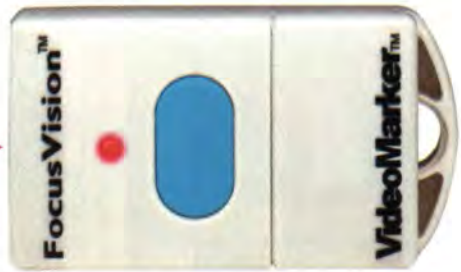
- House Market Research
- Shugoll Research, Inc.-GroupNet™

Call 1-800-433-8128 or e-mail: [info@focusvision.com](mailto:info@focusvision.com)  
Web Site: [www.focusvision.com](http://www.focusvision.com)





# 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](http://www.focusvision.com) for participating facilities.

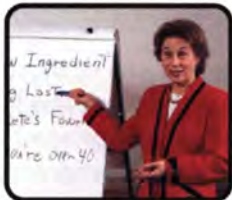
Call FocusVision to schedule a Live Web Interactive VideoMarker™ demonstration before your next qualitative project. For more information log onto [www.focusvision.com](http://www.focusvision.com).

**FocusVision™**  
**VideoMarker™**  
*Get to the good stuff.™*



# FOCUSVISION VIDEOSTREAMING

THE WORLD LEADER IN INTERNET TRANSMISSION  
OF LIVE FOCUS GROUPS.



## THE BEST FOCUS GROUP VIEWING EXPERIENCE OVER THE INTERNET.

See close-ups of group members' facial expressions and body language. See the details of product packaging as well as full group views and picture-in-picture technology. The bottom line: you won't miss a thing.

### Dual Cameras

- Our exclusive dual camera setup (with an on-site operator always present) provides the ultimate viewing experience.

### The Largest Focus Facility Network

- Over 120 US locations include clients' most preferred focus facilities. Book your favorites. Internationally, we have first-rate

focus studios in the major cities of Europe, Asia/Pacific and Latin America.

### Reliable, Seamless Transmission

- Our certified on-site technicians, full-time engineers and project coordinators make certain that all projects are handled efficiently.



**FocusVision™**  
WORLDWIDE, INC.

1266 EAST MAIN STREET STAMFORD, CT 06902

(203) 961-1715

To find out more about FocusVision, call 1-800-433-8128, option 6, or [www.focusvision.com](http://www.focusvision.com)



you get bored of the family and company? How about doing something online?)

### Time perception

The time-related aspects of online surveying have one last element that

ing from slower spoken surveys (CATI) to typed surveys (Web). The table shows comparable response results for varying methodologies. Note: the measurement groups were taken from various side-by-side studies conducted from 1999 to 2001.


Measurement	Result
Rate of reading questions to respondent (CATI)	200 words per minute
Rate reading questions (Web)	325 wpm
Rate hand-writing open-ended responses (self-admin)	32 wpm
Rate typing open-ended responses (Web)	48 wpm
Words written (self-admin)	38.4
Words typed (Web)	144
Time spent dictating open-ended response w/o probe (CATI)	0.3 minutes
Time spent dictating open-ended response w/ probe (CATI)	1.1 minutes
Time spent writing open-ended response (self-admin)	1.2 minutes
Time spent typing open-ended response (Web)	3.2 minutes
# of unique thoughts verbal w/o probe (CATI)	2
# of unique thoughts verbal w/ probe (CATI)	3
# of unique thoughts handwritten (self-admin)	4
# of unique thoughts typed (Web)	4

appears to have even more influence on respondent preference than either the time-compression or time-selectivity advantages: time perception. Getting back to our adage about time flying, the human perception of time tends to vary with the desirability of the activity in which one is engaged (over a reasonable period of time). The more desirable an activity, the shorter the perception of elapsed time of engagement. In this regard, online research wins another round. When using matched surveys of approximately the same length (1999 study), respondents tended to systematically underreport the amount of time needed to complete the online exercise (about 5 percent to 10 percent faster than the actual time taken). Conversely, they tended to overestimate the time needed to complete a phone survey. Open-ended comments related to preference for online included many references to "speed of completion" versus other methods.

And, in fact, time measurement statistics do show a speed gradient rang-

ing from slower spoken surveys (CATI) to typed surveys (Web). Do people absorb any more task information when it is read to them versus reading it for themselves? These types of questions need to be answered in a more structured way. In a follow-up article, I will present an in-depth analysis of content and level of sophistication of open-ended questions captured via written-versus-typed input methods.

### New and improved

As competing activities vie for the shrinking amount of respondent attention, research will be needed to find new and improved ways of creating a faster, easier, and more engaging interview environment. The Web as a research medium must continue to innovate in order to meet all of these goals in an ever more time-sensitive market. Failing to do so will necessitate paying larger and larger incentives to successfully compete with other, more fulfilling activities. 

## When it comes to reliable data collection



## we know the ropes

### 750 CATI stations

- Take advantage of our ability to handle any size project

### 15 years experience

- We've learned what it takes to get a project done right . . . right now

### 12 Intermountain West locations

- Utilize our friendly, hard-working, accent-neutral interviewers

### Blended Modes - W.I.R.E.™

#### Wats Integrated Research Engine

- Combine CATI, Web, and IVR survey modes without additional programming and set-up charges

### Surveyguardian®

#### e-interviewing service

- Improve your Web surveys by adding live-chat interviewers

### Wats real-time reporting

- See the results you want, when you want them

## Experience the Western Wats difference

Call (801)370-2220



Western Wats

www.westernwats.com



# At my own pace in my own place



## Respondents share their thoughts on participating in online bulletin board research

By Theo Downes-Le Guin, Ted Kendall, and Ruchira Gupta

*Editor's note: Theo Downes-Le Guin is principal of Doxus, a Portland, Ore., research firm. He can be reached at [theo@doxus.com](mailto:theo@doxus.com). Ted Kendall is vice president of innovation and development at QualTalk, a Castle Rock, Colo., qualitative software company. He can be reached at [tedk@qualtalk.com](mailto:tedk@qualtalk.com). Ruchira Gupta is a researcher at Doxus. She can be reached at [ruchira@doxus.com](mailto:ruchira@doxus.com).*

**A**s a method for conducting qualitative research, online bulletin boards (or bulletin board focus

groups, as they are sometimes called) continue to grow in popularity. Online bulletin boards are similar to Web-based focus group or chat sessions, except that they occur asynchronously. The moderator posts a question on a secure Web site; participants log on at their convenience throughout a one- or multi-day period and respond to questions. Each participant can see the answers that others have given (usually after posting his or her own comments) and is encouraged to interact with other participants, not just with the moderator. The ideal result is a rich,

developed dialogue about the given topic.

QualTalk, a Castle Rock, Colo., provider of bulletin board research software, has seen demand for bulletin boards quadruple from a year ago, and we believe demand will continue to grow as researchers find that the combination of convenience, depth of discussion, and group dynamics proves useful for certain qualitative research situations. To date, however, most articles on online bulletin boards have described the method from the researcher's perspective — how the



WARNING:  
The use of ActiveGroup  
may be habit-forming

# ActiveGroup **NEW Clientlounge!** Version 3.0

Larger  
viewing  
window

Customizable and  
brandable lounge  
wrapper

Chat with AND  
Instant Message  
other viewers!

More robust  
tools to enhance  
your viewing experience



Costs 60% less  
than video  
conferencing

Easier to use  
than similar  
services

CD made  
containing all  
of your research

Friendly and  
reliable tech  
support

100% secure,  
ActiveGroup-owned  
network

## How does ActiveGroup work?



This is your research.



This is you viewing  
your research.



This is what you save.

Contact David Nelems, Catherine Sturdivant, Monika Orr or Jennifer Smart.

800.793.3126  
[www.activegroup.net](http://www.activegroup.net)



bulletin boards differ from traditional focus groups, tips and tricks, and so forth. But how do participants feel about this new approach to giving qualitative feedback?

Over the past year, Atlanta research firm Doxus has included questions in several bulletin board discussions to learn how participants react to the method. (Doxus is a licensee of the QualTalk bulletin board software.) Typically, at the end of a bulletin board discussion, participants were asked about their experience of participating in this format as compared to other forms of research in which they may have taken part, including surveys and focus groups. Keep in mind that the research populations and topics for these projects vary widely, but for the most part we talked to professionals and a few consumers regarding technology products and services. We chose the bulletin board method for these projects because of its appropriateness to the population and topic, so this article in no way represents feedback from a

stringent experimental "research on research" design.

We reviewed the responses of 110 participants taken from a dozen bulletin boards to assess the experience from the participants' perspective. Our questions about the bulletin board experience were open-ended, but generally, we talked to participants about their experience in terms of: convenience, discussion and interaction quality, and software interface/usability.

#### **Convenience: the wherever, whenever factor**

Most of the participants we interviewed had participated in traditional, in-person focus groups or standardized surveys in the past, with a smaller subset having participated in other online qualitative methods such as online focus groups. Participants expressed a preference for bulletin boards in terms of convenience compared to in-person research methods, and to some extent compared to online, real-time focus groups

because of their flexible, asynchronous approach. Many comments regarding convenience underscored the general appeal of the methodology:

"I liked it quite a bit actually. Flexible schedule, lots of opinions, and good questions. On line provides [the] best value of time."

"I liked this format. I have done online focus groups and I have done in person research groups. I hope more research groups will take this approach in the future."

The bulletin board methodology allows respondents to participate from anywhere, according to preference and their ability to get the most reliable or fastest Internet access. Participants said the method also offers flexibility in terms of timing as they can "pop in and out of the discussion" over a relatively long period of time.

In sum, participants appear to recognize and appreciate that bulletin board discussions are very different from the traditional approach to

## Online Research On Your Wavelength

[www.ithinkinc.com](http://www.ithinkinc.com)

We're a research company focusing exclusively on the Internet — NOT an Internet company trying to do research. **i.think\_inc.** is your online research department with: Web-based surveys and i.focus groups • live data • online cross tabs • proprietary respondent database • self-directed survey tool. [questions@ithinkinc.com](mailto:questions@ithinkinc.com)



**[i.think\_inc.]**



research, which involves a contained interaction that may or may not happen at the respondent's convenience.

#### **Discussion quality: thoughtfulness versus spontaneity**

To some extent we can infer that bulletin boards' flexibility and lack of time pressure lead to increased discussion quality. Participants remarked that self-pacing allows them to post more thoughtful ideas and to reply more thoroughly to other participants' posts. In the final analysis, this benefit is fairly subjective,

lack of dominance of strong personalities as a merit of bulletin boards compared to an in-person focus group. Because of dominant respondents, "some in-person group interviews don't give enough opportunity for everyone to express their opinions," while in a bulletin board all participants have (theoretically) equal opportunity to post their comments without being "dominated by...persons that love to hear themselves talk."

Despite these advantages, however, we found that a subset of participants is keenly attuned to the trade-offs between participating in an in-person group versus a bulletin board. Many participants recognize that the bulletin board discussion is not always able to achieve the richness and participatory gratification of an in-person focus group — a point with which, at least for some topics and populations, we wholly agree. The concern is not so much the lack of

**Many participants recognize that the bulletin board discussion is not always able to achieve the richness and participatory gratification of an in-person focus group.**

and varies substantially by individual. Across many studies we have noticed that some participants indeed take the time to consider and edit their responses, while others treat the method with the immediacy and relative casualness of a chat session.

As with traditional focus groups, we have observed two elements that drive the overall quality of bulletin board group discussions:

- the quality of individual responses or posts, meaning the ability to understand the moderator's questions and articulate valuable responses; and
- the quality of the discussion based on group interaction, and extent to which the group dynamic enhances or goes beyond the moderator's initial questions.

A few participants mentioned the

**RESEARCH & STRATEGIC SOLUTIONS:**

**POWER TO CHANGE YOUR WORLD.**



We uncover information vital to your business -- capitalizing on the inherent benefits of the Internet.

E-commerce Satisfaction, Business-to-Business, Website Design Evaluations, Employee Satisfaction, Online Focus Groups, and more.

The MORPACE approach: Power to change your world. Contact Susan Semack or Jeffrey Leiman at (248) 737-5300. Visit our website at [www.morpace.com](http://www.morpace.com).

**MORPACE International**  
Market Research and Consulting

Corporate Headquarters: 31700 Middlebelt Road, Farmington Hills, MI 48334 USA 248-737-5300 [www.morpace.com](http://www.morpace.com)  
UK Office: Hollywood House, Church Street East, Woking, Surrey GU21 1HJ England +44 1483 737000



spontaneity of an online discussion as it is the absence of the liveliness of an in-person focus group. But, as one respondent neatly summarized, "You're trading off the spontaneity of real-time interaction for responses that are perhaps more thought-out."

A related concern regarding bulletin boards — and one that is obvious to researchers who've used the method — is that the price of a leisurely discussion pace is the difficulty of maintaining participants'

attention over a longer period of time and through multiple interactions rather than just one. Some participants we interviewed commented that the online experience simply didn't grab and hold them as an in-person group would. In terms of sheer physical stimulation, most participants with a basis for comparison agree that in-person groups are optimal for keeping participants engaged:

"It's easy to drop out of an online

exchange."

"In-person...you're in a controlled environment without the distractions of the office."

All in all, we find that participants reflected nearly all the pros and cons we have found in using the bulletin board method. Participants recognize that a certain interpersonal quality (as well as the simple pleasure of meeting new people) is lost, but in place they may gain a chance to express themselves more fully or consistently. As with other methods, the researcher is ultimately responsible for maintaining participation rates by making sure that the appropriate respondents are recruited, the discussion is relevant and interesting, and reasonable means are employed to keep participants engaged throughout the process.

#### Software interface and usability

We heard mixed reactions to the QualTalk user interface. Some felt that the "software was extremely easy to use and lends itself more to discussion than debating." Others experienced problems such as runtime errors and navigability issues. (The interface was updated during the year these discussions were conducted, in part as a response to participant comments and needs. Some of the bulletin board discussions from which this article is drawn were simple text posts while others used whiteboard graphics, embedded links, and other tools that proved challenging for some participants.)

On the whole, most first-time participants quickly grasped the asynchronous nature of a bulletin board and were able to easily take part in the discussion. The technical problems some faced usually came as a result of the unpredictable nature of technology — idiosyncrasies of browser version, connection speed, and Internet congestion, or Windows registry conflicts. Reactions to the software interface thus depended largely on the unique experience and technical sophistication of the user. Many of the participants we interviewed during this period were IT



## BE A FLY ON THE WALL AT THE MOMENT OF TRUTH.

Want the truth about who's buying your product? Who's not? Why? Why not?

Nothing gets you inside your customer's head like in-store studies with Test Track Research. We're retail reconnaissance specialists. And our in-store research can uncover truths that no phone survey or mall intercept can touch.

Plus, Test Track can gather market intelligence on everything from shelf space to out-of-stocks. And do everything on time and within budget.

Get to the truth. Call Test Track today and ask for Doug Ranshous.

973-360-1660

**TEST TRACK RESEARCH**  
The truth from the trenches.



managers, resellers or relatively sophisticated end users, which on the whole resulted in a lack of serious usage problems — but also created high expectations for a glitch-free experience (“It was disappointing to be ready to participate and have to wait until the technical problem was addressed. Other than that I thought this program was easy to use.”).


Remember, however, that our analysis only reflects the comments of those who “hung on” through a full session. Initially, our bulletin board discussions demonstrated significant drop-off in participation over time. Anecdotal evidence we gathered while trying to convert non-responders into engaged participants showed that technical difficulties can be a real factor in this drop-off. Technically literate participants may be more likely to see the process through. However, changes to the interface and the underlying programming during the year, which resulted in greater technical stability and fewer technical problems, result-

ed in a lower drop-out rate due to technical issues over time.

### Practical implications for researchers

From a participant’s point of view, the bulletin board group experience is clearly different from a face-to-face interaction, and on balance the differences are complementary to the method. The convenience of participating in a bulletin board suggests high suitability of the method for research among professional populations who are hard to recruit for a synchronous two-hour focus group, whether in-person or online. The apparent likeability of the method for most participants further suggests that, while in-person or online chat-style groups may sometimes offer a more fun and participatory experience, the bulletin board approach can be equally rewarding for participants. The most important inference we can draw from this feedback is that asynchronous discussions may actually lead to greater

cognitive involvement for some topics, while erasing barriers to equal participation such as typing skills or verbal articulateness.

Participants’ comments regarding quality of discussion and interaction underscore our belief that the method is not appropriate for every topic or every participant. Attempting to uncover deep personal values and emotional motivations, for which moderators typically rely heavily on non-verbal cues and patterns of group interaction, is difficult in bulletin board discussions. An interesting exception to this may be topics of extreme sensitivity or where there are major social desirability biases. Bulletin board groups offer a real — but in our experience untested — opportunity for candid feedback due to the relative anonymity and low pressure of the setting. As the method catches on, we look forward to contributing to — and benefiting from — an emerging “best practices” knowledge base for how and when to use this method. 



Cubic Zirconia



Diamond

# There’s opinion and then there’s Opinion Place

Research conducted through AOL’s Opinion Place is proven to be more valuable. Real-time, prescreened respondents constantly flow from the largest Internet network in the US\* - with superior incentives and quota controls driving 85% completion rates from the exact target you need to reach.

Don’t be fooled...there *is* a difference. Come see for yourself.  
(513)552-8700 sales-us@spssmr.com www.spssmr.com/OP



\* AOL Time Warner network sites rank #1 in home and work usage, visited by 80% of online users in the US. Source: Jupiter Media Metrix, April 2002





*Editor's note: Steve Ellis and Pamela Ellis are partners at Change Sciences Group, an Irvington, N.Y., consulting firm. They can be reached at [steve@changesciences.com](mailto:steve@changesciences.com), [pamela@changesciences.com](mailto:pamela@changesciences.com), or at 914-674-4411.*

**D**iscovering what online customers want is hard enough. What about finding out about what online customers actually do? What customers want is surely important. Not knowing about what they do and why can break even the strongest business model.

There is no shortage of customer-

oriented frameworks available to those considering sharpening their customer focus. We've got traditional market research with surveys and focus groups. There is the emerging field of Web analytics and CRM with a host of new data mining tools for analyzing clickstream data. There is even Web-based software that pretends to test the usability of a Web site by emulating the supposed actions of the site's users — users that, like a well-written piece of software code, will always find the shortest distance between two points.

What marketers frequently lack is an understanding of what real cus-

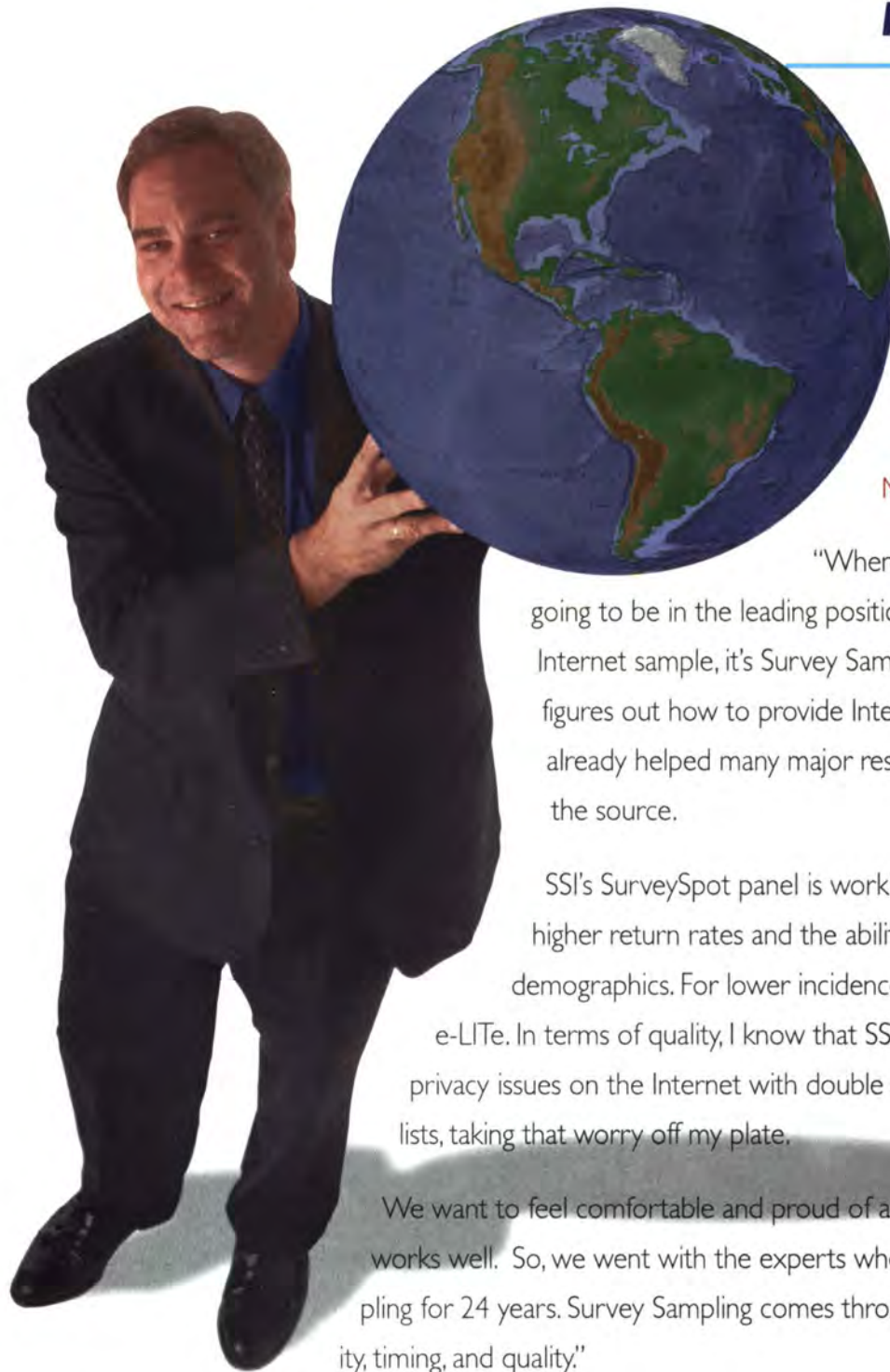
tomers are doing and why they do it. We may need look no further for an explanation than the emotions evoked when we encounter the real presence of the unwashed customer actually using our products. Nothing gets more groans from a development team than watching user after user miss the add-to-cart button, or articulate more clearly than anyone dreamed possible exactly why a costly feature has no value.

#### **The subtleties of observation**

New technologies tantalize us with the potential for new customer insights. Although the verdict is still



# “SSI is a key Internet research sampling resource.”



## **Dan Peterson, Insight Tools**

(Insight Tools is a joint venture between General Mills and MarketTools, offering Web-only research for clients outside the General Mills families of brands.)

“When you think about who is going to be in the leading position for providing quality Internet sample, it’s Survey Sampling. As the industry figures out how to provide Internet sample, SSI has already helped many major research companies. SSI is the source.

SSI’s SurveySpot panel is working well for us because of higher return rates and the ability to focus a bit finer with demographics. For lower incidence screening, we utilize SSI’s e-LITe. In terms of quality, I know that SSI is dealing with all the privacy issues on the Internet with double opt-in and valid dedupe lists, taking that worry off my plate.

We want to feel comfortable and proud of an Internet sample that works well. So, we went with the experts who have been doing sampling for 24 years. Survey Sampling comes through with credibility, reliability, timing, and quality.”

Call SSI for sampling solutions at 1-203-255-4200 (free phone 00 800 3589 7421 from Germany, Netherlands, and the UK), send e-mail to [info@surveysampling.com](mailto:info@surveysampling.com), or visit SSI’s Web site at [www.surveysampling.com](http://www.surveysampling.com).



*Partners with survey researchers since 1977*



out on whether the benefits of Web analytics and CRM systems outweigh their high costs, they show promise for determining ROI on ad dollars, as well as offer some improvement to traditional Web server log file analysis. What is often missed is that these systems provide only an aggregate view of behavior. They say little about why people haven't done what they were expected to do, or what we didn't think to ask. They don't tell us about the subtleties of what did or did not work.

It is the subtleties that should interest us most these days. The Web has no standards for how a user's experience should be structured. Beyond the four most common form elements — the text entry area, the drop down, the checkbox and the radio button — all bets are off. This is part of the charm of the Web, but it also leads to subtle problems that can have big consequences for the customer experience, and the bottom line.

There's no better way to uncover these problems than to sit down and observe customers as they use the Web. To be distinguished from automated "customer tracking," this type of research is about learning from real people, face to face. Learning to listen to customers as they use our products can have a cumulative benefit as well. Assumptions about human behavior begin to break down. Sometimes it startles us just how subtle these assumptions can be.

### **The myth of the non tech-savvy user**

Designers will often simplify an interface in an attempt to reach a wider, "less technical" market. A number of recent Internet appliance products have taken this approach, hoping to reach people who haven't yet adopted PC access to the Web. The tactic can succeed under some circumstances, but it can also backfire. When we went to ask a group of young women how they might use a new Internet appliance, they couldn't see themselves using it. On the

other hand they were sure older people might like it. When we spoke with a group of older people, they were cool to the product's approach. They didn't require anything to be "dumbed down" for them! They did suggest that younger people might appreciate the cute aesthetics of the product.

Simplification is not always the way to bring in less sophisticated Web users. Instead, designers might take more time to learn about who the less tech-savvy users are that they are trying to reach. "Less tech-savvy" is not exactly a valid description of a full-fledged human being. Looking deep into the context of a specific "less savvy user" would be a good start.

### **Fewer clicks are not always better**

Minimizing the number of clicks it takes users to get to where they need to go is an accepted principle of Web design, as it should be. But lately it seems to have been taken a little too far. Pages with three, four, and five columns are now the norm. Pages have navigation on the top and navigation on the side. The middle of any given page may have as many as 10 or more links.

Few people react to pages like this as we expect them to. They don't read all of their options from the top, to the left, and to the middle and then down the page, carefully noting the relevance of each as it is presented. They don't have the patience or the inclination. Instead they skip around and miss important pieces because they are distracted by other pieces. In a recent test of a large commercial Web site, person after person displayed an odd blindness to the presence of the left navigation bar when asked to complete a task by choosing an option on it, even though the bar followed most of the conventions of left navigation that many users are used to. They just simply missed it, over and over again. A big contributing factor was that each page had dozens of options, all in an effort to improve usability by reducing the

number of clicks.

### **Whose process is it?**

A corollary of the "too many clicks" problem is the problem of process. Whose process is it? Is it the company's, the marketer's, the programmer's, or the customer's process?

For example, a number of Web applications that interface with devices like MP3 players or PDAs require a second application to interact with that device. Since these applications require functionality beyond Internet Explorer or Netscape, programmers will build so-called "helper apps" using the Windows user interface. The problem is that once these helper apps pop up, people often don't know what to do with them. It's not that they don't know how to use Windows. It's that they were on the Web and suddenly they are thrust into the Windows world and expected to make the transition. Often, they don't, and are left to consider what exactly this intruder has just popped up to do.

Another example: problems with company-oriented process go beyond the Web site that's been organized according to the structure of the company's departments or divisions (which is, of course, usually a bad idea as well). Company-oriented process can be far subtler and harder to detect. Take for example the use of the word "beneficiary" on many online banking sites. To many ordinary users of banks, the term connotes "the person who gets your money after you die," not the recipient of a wire transfer. The interface might just simply ask, "Where do you want to transfer money?" instead of introducing confusion by adding the troubling term.

### **Embracing the familiar**

Metaphors are everywhere in information technology. We have the "desktop" and the "Web page." Metaphors are touchstones that orient us, providing a ready-made context where there was none. Web applications use metaphors all the time. Entire



applications are wrapped within them. When Web-based e-mail programs began to appear, the inbox and outbox motifs were carried over from software (and from physical office spaces before that), helping to make the new idea of getting e-mail on the Web seem routine.

Metaphors are powerful framing mechanisms, and choosing the wrong metaphor or making seemingly inapt comparisons can foil even the best-laid plans. Many Web applications are designed to make searching easier and provide more relevant results. When speaking with one such company recently we were told again and again by designers that their product was "better than a search engine." Its technology provided far superior indexing of products relevant to the field. And it did. This notion of "better than a search engine" was incorporated into its marketing literature. Salespeople touted its "better than a search engine" qualities to potential customers. The assumption was that people were by now used to using a search engine and getting a flood of irrelevant results.


When we tested a prototype of the product in the field a curious thing happened. And it happened over and over again. No matter how many times we explained that the product used a special indexing technique unavailable anywhere else, people kept adding: "Yes, that's great, but I can still get more information on the Web," the perception being that the Web would always have more (and better) information. The phrase "better than a search engine" just wasn't working. Reframing the product as a search engine for professionals short-circuited the problem. The fact that it produced better results would declare itself by example.

#### Why we're lucky log files don't talk

Figuring out who users are, what they do, and what metaphors work for them are challenges every Web team faces. Web analytics and CRM are only one element in a comprehensive customer experience strategy. By talking to real customers and watching them interact with products can we begin to form an understanding of why things aren't work-

ing (and how they might work better). Logs don't talk. Luckily people do.

Perhaps someday our interface technologies will be so simple and transparent there won't be a need to bring the humble user into the process. Development teams will rest assured that their works are truly works of genius, without getting muddled in the reactions of other humans. Futurists will declare that computers have finally realized their true purpose, to serve us, rather than the other way around.

For now we're stuck with trying to understand the messy subtleties of human-machine communication. At least that's one way to look at it. Here's another: Maybe for the first time it's becoming really necessary to look at, listen, and learn from our fellow humans when we design information systems. 

### QuickLink

For more on usability testing, visit [www.quirks.com](http://www.quirks.com) and enter Article QuickLink number 709 ("Tapping into the usability dimension").

# ON-LINE COMMUNICATIONS

[www.on-linecom.com](http://www.on-linecom.com)

★ Three Central Time Zone Locations

★ All CATI Stations with CfMC C-Servent


★ Predictive Dialing

INFORMATION YOU NEED...PEOPLE YOU TRUST

Peggy O'Connor • Nancy Hayslett • Frank Markowitz

**800-765-3200**





# The wireless Web

*A primer for market research professionals*

By Jeffrey Robbins

*Editor's note: Jeffrey Robbins is CEO of Database Sciences, a Paramus, N.J., provider of Web-based opinion research services. He can be reached at [jrobbins@dbsciences.com](mailto:jrobbins@dbsciences.com).*

**T**he wireless Web offers great promise. In magazines ads and TV commercials we are being bombarded by cell phone makers' and wireless providers' images of our digital future being tied together by their products and services.

In this article, we'll take a brief look at the different technologies,

what's out there now, what's on the horizon, and what the applications are for market research professionals. We'll pull apart acronyms and explain buzzwords so that not only will you be able to "hear me now," you'll be able to understand what the heck I'm talking about, as well.

#### **Definitions — what's in a name?**

The wireless Web means different things to different people. The term wireless Web can be confusing, as it actually has been used to describe completely different technologies.

Most recently, wireless network products have improved and become more popular, so that some people refer to the wireless Web as sitting in their backyard and surfing the Web via a wireless network (Wi-Fi, for wireless fidelity) connection from their laptop to their cable (or DSL) modem. More commonly, however, people refer to the wireless Web as accessing the Internet via a cellular telephone service provider's connection. Even in this case there are multiple meanings, as wireless/cellular providers are touting two different Web services





coordinated.

When you're conducting a focus-group study in many different cities, there's a lot to do. Somebody has to make sure uniform standards are being applied. Somebody has to be in constant touch with facilities near and far. Let the Fieldwork Network be that somebody. We promise the kind of service in which the right tentacle always knows what the other 7 are doing. Call 1-800-TO-FIELD.



It takes  
**fieldwork**

[www.fieldwork.com](http://www.fieldwork.com)

atlanta: 770.988.0330

boston-waltham: 781.899.3660

chicago-north: 847.583.2911

chicago-o'hare: 773.714.8700

chicago-schaumburg: 847.413.9040

dallas: 972.866.5800

denver: 303.825.7788

east-fort lee, nj: 201.585.8200

minneapolis: 952.837.8300

new york-westchester: 914.347.2145

los angeles: 949.252.8180

phoenix-scottsdale: 480.443.8883

phoenix-south mountain: 602.438.2800

seattle: 425.822.8900

For multi-location projects, call:

1.800.TO.FIELD (1.800.863.4353)



these days: Web browsing directly via a handheld device (i.e., cell phone or PDA) and Web browsing via a traditional computer (usually a laptop) that is "dialing up" the Internet through a cell connection.

For the purposes of this discussion, we will consider the latter definition of the wireless Web; that is, accessing the Internet via a cellular provider's connection. Once again, there are two subcategories within this definition: accessing the Web directly from a handheld device (cell phone or PDA) and dialing up the Web through a laptop via a cellular provider's connection. Ultimately, however, everything will come together (convergence, in the parlance of the industry) and the patchwork of LANs, Wi-Fi devices, WANs, wired and wireless Internet connections will seamlessly be integrated into an always on, always-available high-speed river of digital data that will be accessed by many different devices and appliances in our homes, offices, and pockets.

For anyone, let alone market

research professionals, the benefits of this convergence of the technologies of communication are apparent. Each technological innovation moves us closer to minimizing the number of devices with which we communicate, as well as keep updated and synchronized. On a simple level, the idea of having readily available high-speed Internet access through a laptop is a godsend to many people who are not often tethered to one specific workplace. In an airport, a hotel, a client's office, or yes, even a backyard, the Web would be a click away without having to worry about connection protocols. As of now, though, the new high-speed wireless Internet services (referred to as 3G) are just being rolled out by the major wireless carriers, and as a result, coverage areas are limited, connection speeds vary, and prices are high. The near future of wireless Internet services is bright, though, because of the new wireless infrastructure coming on line, as well as the push to put more Web-enabled handheld devices in consumers'

hands to take advantage of the service upgrades.

### Cell phones and PDAs

Despite growing momentum, the wireless Web is a long way from being a mainstream medium. According to Forrester Research, adoption of wireless Web devices increased by about 10 percent in North America in 2001. Still, at the end of last year only 5.4 percent of North American households had wireless, portable Internet access. The split between consumers using Web-enabled cell phones and PDAs to connect wirelessly to the Web is 84 percent cell phone/16 percent PDA. Forrester says that sending e-mail and checking weather and news are the top applications that people are using their wireless Web devices to tap into. New phones are being equipped with GPS technology to take advantage of soon-to-be-offered mapping services (I can't help of thinking that we're all about to be "tracked" animals, kind of like on *Mutual of Omaha's Wild Kingdom* television program).

E-mail is the killer app, or application, in the wireless world, both on the consumer and B2B sides. At the enterprise level, handheld BlackBerry devices have become an invaluable tool for many mobile professionals, enabling them to access corporate e-mail services on the road. Access to other corporate services are also possible with these devices, and third-party vendors are offering a widening array of tie-ins to give road warriors more options to corporate network services.

Convergence of technology is occurring in handheld devices as well. Hybrid cell phones/PDAs are now available with built-in Web microbrowsers. Of course, the decision to go that route is not so simple. Do I want a tiny cell phone and only bring my Palm device with me when I need it? Or do I carry a larger device that does everything? Yet, at the same time, if I choose separate devices, will I need to access the Web more often from my cell phone (with a very

# CFMC

COMPUTERS for MARKETING CORPORATION

**Celebrating  
35 years of  
premier service  
to the marketing  
research industry**

**CfMC software – products  
that stand the test of time  
and technology.**

**WebSurvent  
Survent  
SoundSurvent  
Mentor  
COSI  
Script Composer**

**Visit our Website at  
<http://www.cfmc.com>**

San Francisco: (415) 777-0470  
New York: (212) 777-5120  
Denver: (303) 860-1811  
London: (0)207 514 5844



small screen to display Web content) or should I invest in Web access on my PDA? Tough choices.

### Surfing on a cell phone

Surfing the Web on a cell phone (or even PDA) is not a very practical activity. In addition to very small screen sizes on these devices, entering Web addresses is far more difficult than on a computer keyboard. Fortunately, wireless Web providers have set up regular, "wired" Web sites where wireless Web users can configure their microbrowsers to display customized content (including bookmarks or favorite places) when they connect via their wireless device. In addition, wireless connection speeds are well below what we've come to expect from high-speed wired options like cable or DSL connections.

While it appears that connection speeds will soon be better (thanks to technologies like 3G), content is limited right now. Cell phones and PDAs cannot simply access any Web site. To adapt to the relatively tiny screen sizes on cell phones and PDAs, Web site content has to be in a format that can be read by the WAP (Wireless Application Protocol) microbrowsers in these devices. In order for a Web site to properly offer content to microbrowsers, the HTML (Hyper Text Markup Language) code that defines regular Web pages must be translated to the WAP version, or WML (Wireless Markup Language). More importantly, wireless Web designers must figure out what kind of functionality is appropriate for screens that are a small fraction of the computer monitors people ordinarily use to browse the Web. Currently, only a very small percentage of the Web sites in existence have made their content accessible to WAP devices. As the number of wireless Web accessible devices continues to grow, companies and Web developers will be challenged to translate their existing Web content (or create new applications) for this burgeoning market.

While not really part of the wireless

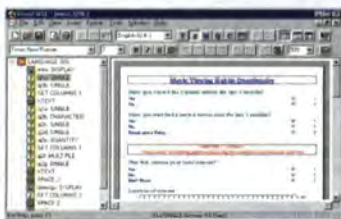
Web, there is another notable wireless data service that is quickly gaining users: text messaging. SMS (Small Messaging Services) is a key protocol behind the text messaging on many cellular networks, which is kind of like e-mail specifically for cell phones. Part of the appeal of text messaging is that, like e-mail, it is an efficient communication medium that affords users the ability to conduct a timely dialogue without conversation. Limitations include message length

(SMS messages may only be 160 characters long), and there are some issues with sending messages between cell carriers' networks that may not use the same messaging protocol. In the future, as marketers inevitably begin to try to reach customers via text messaging, we may have to contend with messaging spam as well.

### Research opportunities

OK, now that we know what's out

# On-Line Surveys: Step - By - Step



**Step 1:  
Write your surveys  
with Visual QSL**

**Step 2:  
Put up and manage your  
surveys remotely with the  
Internet Management Kit**



**Step 3:  
Interview using  
Bellview Web software**

**Step 4:  
View tables and charts in  
real-time with Pulsar Web  
using only a browser!**



Pulse Train, Ltd.  
631 U.S. Hwy. One • Suite 406 • North Palm Beach • FL • 33408  
Telephone: 561-842-4000 • Fax: 561-842-7280  
E-mail: Sales@PTTSYSTEMS.com • Web Site: <http://www.PulseTrain.com>



there, what can we do with it? High-speed wireless Web access offers specific opportunities for market research professionals in the areas of communication and field data collection. Consider the idea of a "digital clipboard," where interviewers are scattered around the country (or the world) at public locations (malls, amusement parks, polling places) and equipped with laptop or tablet computers that send data via high-speed wireless connection to a central interview software server. Interview data can be captured in real-time, affording the research sponsor the possibility of near-instant feedback.

Let's drill down another level and discuss reaching respondents directly via the wireless Web. In the near term, the applications via this medium are restricted both because of the market penetration of wireless Web devices and the limitations of the technology. If we consider using common Web surveying tools to interview respondents via cell phones or PDAs, we must take a good look at

both our target audience and the content of the interview. Because of the small screen sizes of cell phone and PDA microbrowsers, surveys deployed to these devices need to be carefully crafted. For example, the built-in logic features (skip patterns, data validation, etc.) of Web survey servers can be taken full advantage of, but not their ability to display rich graphics and multimedia.

Short survey or polling applications to a very specific target group can be very effective. Polling mobile employees, "intracompany," or surveying attendees at a trade show are examples that we have seen executed well.

Text messaging offers another opportunity to reach respondents on the go. Again, because of the current market penetration of the technology, the target audience is a key determinant of whether it is an appropriate methodology. If so, we can send messages to ask potential respondents to participate in Web surveys (either via their mobile device or standard com-

puter), or we can ask them to send text message replies to survey questions directly. The latter technique, of course, limits the use of advanced logic functionalities that Web survey systems enjoy.

In our practice, we use the wireless Web in another aspect of the fieldwork we do on behalf of our clients: monitoring results. While a study is in the field, I often need to look at real-time statistics of the study. Sometimes it's as simple as knowing how many respondents have completed a particular study at a specific point in time, sometimes it's more detailed in terms of specific quotas or marginal calculations on answers to a particular question. We have built wireless Web functionality into our Web server so that this information can be accessed on our cell phones' microbrowsers. This functionality is made available to our clients as well. From a personal standpoint, it is terrific to be able to keep abreast of my clients' studies, regardless of where I am or what time of day it is.

#### Where do we go from here?

Just as market research on the wired Web was a brand new frontier just a few short years ago, we find ourselves in a similar position today with the wireless Web. Market penetration statistics simply don't allow us to use this emerging technology to directly reach the general consumer via this medium. For specialized studies and audiences, however, the technology is in place to collect field data from more sources and locations, more efficiently than ever before. The tools exist to turn that data around to our clients so that they can have actionable results on a more timely basis.

Within our professional community, the emerging wireless technologies and devices give us unprecedented mobile access to information, systems, and services. Over time, the so-called virtual office will continue to evolve and the future we see in all those TV commercials and print ads will become a reality. **TM**

# One size doesn't fit all



No two meeting, focus group, or training rooms are alike. Even the needs of presenters differ. So why settle for a one-size-fits-all response system?

Choose from several interactive, wireless Reply® hardware designs...plus multiple titles of powerful, intuitive software...to create a system that meets your client's needs. And if despite all these options you still need a special system, we can—as a manufacturer—tailor private or OEM solutions.

With over 200,000 units in service, Reply is the undisputed world leader in group response technology.

Each Reply system uses patented radio designs (not cumbersome wires or limited infrared). These systems are robust, quick to set up, remarkably easy to use and surprisingly affordable.



**Give us a call. Let's interact.**



Manufactured by Fleetwood  
(616) 396-1142 or (800) 257-6390  
[www.replysystems.com](http://www.replysystems.com)





# There are Better Ways to Make the Right Strategic Decision

Information is only as good as its source. When executives look for data and analysis to define market opportunities, pinpoint consumer demand and keep up with the competition, they don't rely on good fortune. They rely on MarketResearch.com.

Why? Because MarketResearch.com has:

- More than 50,000 publications from 350+ top research firms
- No subscription fee
- Daily updates of new content
- Report slices for less than \$500
- Instant Online Delivery

Sign up now for our free Alert Me service and receive email notifications when research relevant to you is added to our site.

Make a smart decision and visit MarketResearch.com today, or give us a call at 1-800-298-5699. Face the facts: you need market research and we are MarketResearch.com.

**MarketResearch.com**  
*Your Single Source for Buying Market Research*





# Choose your usability approach wisely

*Success comes  
from picking  
the right tools  
for the job*

By Lon Taylor, Nick Gould, and Peter Hughes

*Editor's note: Lon Taylor is senior usability consultant, Nick Gould is CEO, and Peter Hughes is principal UI designer, at Catalyst Group Design, New York. All can be reached at [www.catalystgroupdesign.com](http://www.catalystgroupdesign.com).*

**W**ith the increasing maturity of the Internet as a medium, most Internet marketers would agree that the usability of a Web site's user interface is a crucial driver of business success. In fact, over the past several years, many major research reports have been published by organizations such as Forrester, Jupiter, and others that attribute a staggering loss of revenue

opportunities due to poor usability. From significant shopping cart abandonment to negative brand perception, nowadays it's clear that a site with usability problems ultimately leads to a low return on investment. What is less clear at the moment may be how to best identify the right testing methodology for effectively (and cost-efficiently) uncovering and resolving potentially disastrous usability issues.

The traditional testing method, we'll call it lab-based usability testing, involves a series of one-on-one moderated site walkthroughs with no more than 20 total participants drawn from the site's target audience. Lab-based

testing focuses on a close, in-person, observation of the test participant as they attempt to complete the tasks presented to them. An experienced moderator actively engages in a dialogue with the participant that is aimed at revealing the core reasons for any usability problems they have encountered.

More recently, new technologies — generally referred to as online usability testing — have emerged that promise to deliver equally valuable usability feedback with the additional benefit of a much larger sample size (200 or more participants). At a high level, online usability testing is an online survey (without a moderator) that enables par-





# *Innovative Marketing Research*

To Take You Beyond The Competition

Maximizing your marketing opportunities starts with innovative market intelligence. The Olson Research Group is a full service marketing research company that delivers the customized data and insights that you need to make better, faster actionable strategic decisions on your products. Using cutting-edge methodologies, techniques, and technology, we enable you to move beyond your competitors.

Olson Research Group is one of the first marketing research companies to conduct syndicated and proprietary online studies using the Internet. Our expertise in web site analysis and evaluation is backed by knowledge that only comes from being a pioneer in the field.

Backed by more than 25 years in corporate marketing research, our extensive experience means that we understand quality marketing research, how you use research, what you need, and when you need it. We learn your business. Additionally, our superb customer service is why so many clients form ongoing relationships with us.

For more information, or if you would like a corporate brochure, please contact Chip Olson, Senior Vice President at 609.882.9888 ext. 226 or [colson@olsonresearchgroup.com](mailto:colson@olsonresearchgroup.com)





ticipants to walk through a series of sites, pages, and/or site tasks. Test participants are queried along the way for their feedback regarding the material they have seen. Online usability tests can be designed to elicit a variety of different types of feedback, including reactions to design and branding options and other more traditional demographic and behavior oriented questions. Another interesting aspect of online usability testing technology is that the systems provide a detailed click-through tracking of every step a user takes, and this data can be combined with the participant's survey responses in the final analysis.

Lab-based testing long predates the advent of the Internet and is understood and accepted in most design and technology circles. However, traditional research and marketing professionals have only recently begun to incorporate this methodology into their Internet/Intranet product development plans. And now, just as it seems that this method of usability testing is gaining a broader acceptance, the new

online usability testing technologies are gaining a following amongst people who feel that the ability to test with a larger sample size is of paramount importance. In fact, with the different options available to today's Internet marketers, the very nature of the term usability testing seems to be in question. Is usability testing by definition a purely qualitative exercise, or can these new technologies be used to obtain feedback on a site's usability that is quantitatively significant?

Not surprisingly, the online usability companies (such as Vividence, Relevant View, and NetRaker) tout the quantitative aspects of their service. Most promote that they routinely conduct tests with 200-1,000 participants. Another selling point that is frequently mentioned is the "real-world" context of the testing (i.e., the fact that tests are conducted at home or at work, as opposed to in a lab setting). Alternatively, practitioners of traditional lab-based usability testing focus on the quality and depth of the feedback they gather in the one-on-one experience of a controlled envi-

ronment, as opposed to the size of the testing sample. These practitioners believe that the new research technology is useful, but that it's no substitute for the type of qualitative results that a polished moderator can glean when working to identify issues and learn why they exist in the first place.

#### Real-world scenarios

This methodology debate is crucial since selecting the right approach is just as important as making the decision to test in the first place. Lab-based usability interviews and online usability testing both offer the promise of rich feedback, quick turnaround times, a reasonable price tag (\$20K-\$60K) and the occasional "aha" that can uncover a huge glitch that everyone seemed to overlook (see comparison chart). So, in order to better understand the benefits and drawbacks of both methodologies, let's examine their respective pros and cons based on some potential real-world scenarios.

A financial services company has recently merged with a firm in another

## Our Clients Sleep Great



In fact, our clients sleep so well when working with us some refer to Precision as their "I can sleep at night recruiting service". That is how we like to be viewed. You have plenty to be concerned about without having to worry whether the field service you selected is diligently working on and managing your project from start to finish. We refuse to use home recruiters or outside recruiting services because we simply can't control the quality. All our recruiting is done in house under close supervision. So why worry? Call Precision and get a good night's rest so you can be at your best. We'll see you at the group.

**PRECISION**  **RESEARCH**

CALL 847•390•8666 or visit our Web Site: [www.preres.com](http://www.preres.com)



state, so it is interested in redeveloping its corporate Web site to reflect this change and it is also working to select a new company name. The company is interested in conducting some research to:

- gather usability data about its current site;
- evaluate some competitive sites; and
- obtain responses to several possible names for the new entity.

Is this a job for lab-based testing? Although one-on-one methods would certainly reveal the usability issues relating to the current site, an online usability evaluation might offer several additional advantages for this type of engagement. For issues that need to be backed up by a statistically significant sample size, such as feedback on a new company name, the survey based methodology works well.

Since the financial institution is also looking to unearth usability issues from its existing site and from some competitive sites, the online evaluation might provide a more efficient mechanism for gauging the time it takes to complete specific tasks across all the sites of interest. An example might be to ask participants to locate a mutual fund and its rate of return. This exercise and other similar tasks will offer plenty of insight on navigation pathways and how easily participants can use the sites they visit. The test could also obtain measurable user responses regarding demographics, behavioral issues and the various branding or visual design styles adopted by each competitor. Finally, the online evaluation methodology is ideal for this situation in that participants from all geographic regions served by the newly merged company can be recruited via e-mail from or via a pop-up window on the site itself.

Now let's imagine that a brick-and-mortar retailer has just committed to going online. It has defined its site requirements and has prepared a features matrix outlining how items on the site should be weighted based on importance (e.g., should the "shop for a shirt" button be the same size as the "about us" button). Its Internet professional services agency has just completed the first round of design ideas and wants to conduct usability testing on an HTML wire-

frame/prototype with 75 percent of the links being active. The company is interested in conducting research to:

- gain insights on the usability of its wireframe/prototype;
- develop recommendations to address the issues uncovered; and
- observe how effectively users accomplish core site tasks.

Which usability testing method would best serve these objectives? Lab-based usability testing is likely to elicit the best feedback on ease-of-use issues

in this scenario even though the site is not yet fully functional. When a Web site or interface design is at this early stage, it is very important that the usability research reveal whether the value proposition is clearly understood by participants. A well-trained moderator will be able to ask a participant relevant follow-up questions that not only draw out usability issues on a site at the wireframe/prototype stage, but also allow them to explain why they could not complete a task. If a participant fails to

## *"Need help with your Data Collection?"*



### *Make the call to Telepoll!*

1-800-743-6443

Affordable U.S. Quantitative Data Collection  
From Canada

Consider Telepoll as an Extension of your Research Operation...

- ✓ View Survey Form Online
- ✓ Toll-Free Monitoring
- ✓ Dedicated Project Managers and Supervisors
- ✓ Stringent Quality Control Measures
- ✓ Daily Reports Detailed to Your Specifications
- ✓ Online Quote for Your Projects within 24 Hours

telepoll

[www.telepoll.net](http://www.telepoll.net)

Low Cost...High Quality...On Time



complete a task as intended, he or she can be queried in depth about whether the problem was related to nomenclature, functionality, navigation, or readability. The type of dynamic dialogue between a participant and moderator is something that works extremely well

questions may change based on client input. If an issue is resolved during the first day of testing, time can be spent on other items during the next day of testing as two days are typically scheduled to conduct testing. In addition, there's no substitute for having clients view the

dations using this type of methodology are not projectable, and don't offer geographic diversity without added cost, lab-based testing would serve all stakeholders needs given the scenario provided for the retailer.

Methodology Comparison Summary

Issue	Lab-Based Usability Testing	Online Usability Testing
Costs	\$20,000 - \$40,000	\$25,000 - \$60,000
Incentive Costs	\$75 - \$200	\$10 - \$25
Number of Participants	6 - 20	200 - 1,000
Length of Test	60 - 90 minutes	15 - 30 minutes
Geographic Bias	One location per testing round	No limitations
Client Participation	Can attend in-person and read final report	Can view results via the Web in real time with most vendors
Typical Start to Finish Schedule	2-4 weeks	2-5 weeks
Additional Considerations	Best when: • Testing prototype that's not fully functional • Looking for detailed qualitative data • Moderator industry expertise is needed	Best when: • Gathering statistically significant data • Looking for geographic diversity • Analyzing clickstream data from many users

The information above is based on our experiences at Catalyst Group Design. Depending on a wide range of specific requirements for your project, pricing, incentive costs and timing issues may be above or below what's listed.

### Interesting and actionable

Clearly, both ways of implementing usability testing will yield interesting findings and actionable recommendations. If you are looking to obtain "think aloud" feedback on an interface that's more along the early stages of development, then lab-based usability will likely work best. If you are trying to demonstrate a preference for ideas and need measurable opinions, go with an online usability scenario. Debating whether a usability test with 800 people is inherently better than a test with eight people misses the point. Online usability testing technology is not going away and neither is lab-based testing. Each method can provide powerful and actionable results to the Internet marketer who knows when to use it. **14**

in a controlled usability lab over the course of a 60-to-90-minute session and really can't be done as well online.

The lab-based testing methodology also accounts for situations where the line of questioning or the rotation of

sessions behind a one-way mirror. Seeing a participant's non-verbal communication and videotaping sessions for colleagues offers feedback "in living color" directly from the target audience. Although the findings and recommen-

# How To Find The Best Deal On WATS Interviewing.

The high costs of telephone interviewing getting you down? I/H/R Research Group can help — with the highest quality, lowest prices, and best service available anywhere.

- 130 line national coverage
- Certified interviewers
- Project bids in one hour
- 130 Ci3/CATI stations
- Highest quality
- On/off premise monitoring
- On time results
- Low prices
- State-of-the-art technology

What makes I/H/R the best? Some say it's our on-going training program or our great supervisors... But, what seems to make our clients even happier are the really competitive prices. We're growing, so we can afford to bid very aggressively.

If you're tired of the same old song and dance, give I/H/R Research Group a call. We'll make sure your job's done right and at a cost you can live with.

## I/H/R Research Group

*Quality Marketing Research That Works.*

4440 S. Maryland Pkwy. - Suite 203 - Las Vegas, NV 89119 - (702) 734-0757





DATABASE SCIENCES

**A complete, independent  
eFieldFacility**

**powered by**

- 1** A professional staff with experience specific to market research fielding best practices.
- 2** Proprietary technology that enables us to rapidly configure and deploy robust online surveys. By automating the Web programming process, we help our clients streamline the research study lifecycle.
- 3** Quality online consumer and B2B panels.



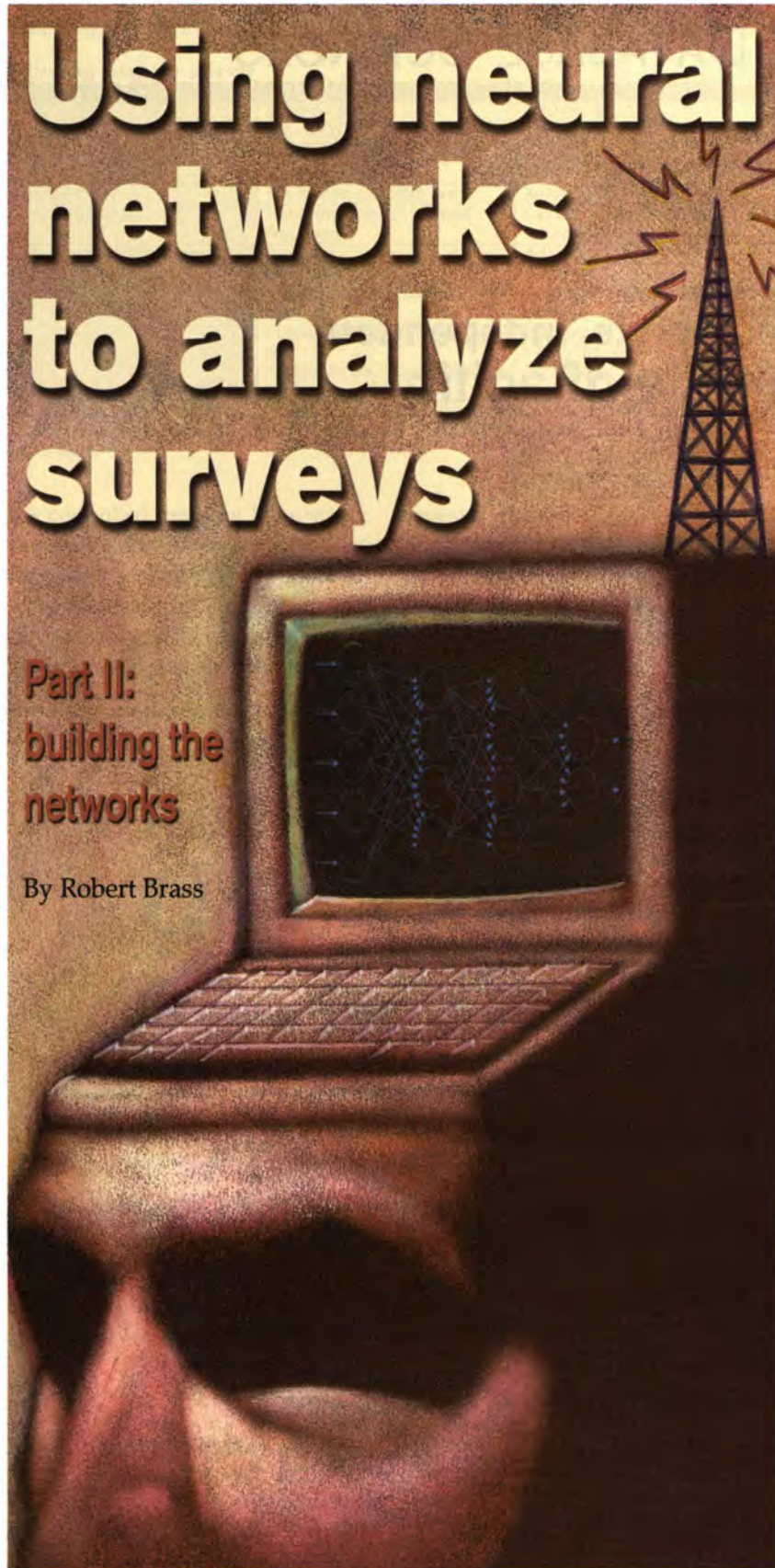
*For more information, or study bids,  
please contact Richard Raffel by  
phone 1-800-742-6035, extension 12  
or e-mail [r Raffel@dbsciences.com](mailto:r Raffel@dbsciences.com).*



# Using neural networks to analyze surveys

## Part II: building the networks

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.*

Last month, at the conclusion of the first of this series of three articles, we had just introduced an example that would act as your guide through the development of the neural network analysis process for survey results. To maintain consistency, the numbering of the figures and rules of thumb in this segment will continue where we left off.

For those of you who cannot conveniently locate the first article of the series, or who are just now deciding that this one might be interesting, we will restate the example. It proposed a business that sent service technicians to fix faulty Internet servers. Following the completion of the service, a survey was sent to the customer to assess their satisfaction level with the repair and the subsequent outcome. There were eight elements that were evaluated (input questions) plus an overall question (output question) to gauge the totality of the process. They consisted of:

1. The ease for the user to initiate a request for service (initiate).
2. The time for the service representative to call and set up an appointment (appointment).
3. The time it takes for the service representative to arrive (arrival).
4. The conduct of the service representative during the service call (conduct).
5. The service representative's effectiveness in informing the user about the repair (result).
6. Communication from the service representative after the repair has been completed (communication).
7. The ability to fix the problem on the first try (first try).
8. Responsiveness of the service



# Creating Connections

In this high-tech world, it's easy to forget that face-to-face interaction is still one of the best ways to learn about people's experiences and impressions. Even though technology is playing an increasing role in data collection, we know it will never replace direct conversations with customers in a focus group setting.

At Delve, we help you find creative ways to connect with your customers. Whether it's a traditional group or one that requires a more adventurous approach, we are experts in recruiting the right respondents to ensure your feedback is reliable and insightful.

Delve creates and fosters environments for dynamic dialogues between marketers and customers. Whether they be face-to-face, voice-to-voice, or technology-based settings like the Web, we are committed to providing the best in the business.

Count on our experts to bring you and your customers closer together. Connect with your Delve sales representative today!

**Focus Groups**  
**Pre-Recruits**  
**Web Surveys**  
**Telephone Interviews**  
**Central Location Testing**  
**Taste Tests**  
**Interactive Voice Response**

**[www.delve.com](http://www.delve.com)**  
**800-325-3338**

Appleton, WI  
Atlanta  
Chicago  
Columbus

Dallas  
Kansas City  
Los Angeles  
Minneapolis

Philadelphia  
Phoenix  
Seattle  
St. Louis



*ISO 9002 Registered*



**THE  
OTHER,  
BETTER VALUE  
SAMPLING  
COMPANY IN  
CONNECTICUT**

since  
1991

Exact Age

Income

Gender

New Mothers

Elderly

Children

Low Incidence

Ethnic

Business

RDD

Many Others



Call for quotes or free brochure.

**AFFORDABLE  
SAMPLES, INC.**™

Old Greenwich, CT 06870

800-784-8016 • FAX 203-637-8569

e-mail 72672.1327@compuserve.com

representative to requests during the service call (requests).

9. Their overall satisfaction with the service call that repaired the server (overall).

As discussed in the last article, 200 individual surveys were finally chosen to be used for the analysis. This, as described previously, limits the total number of input questions that can be evaluated (the third rule of thumb) to seven. The next step, then, is to identify the questions that will be chosen as the inputs to develop the neural network and those which will be eliminated.

**Correlation, the Achilles heel of survey analysis**

The phrase "a rising tide lifts all boats," in an abstract way applies to customer satisfaction, employee satisfaction, product selection, and many other surveys. It relates to the phenomenon that there is a normal correlation that exists between the majority of the respondent's answers in a typical survey. For example, in a customer satisfaction survey, a person who is Totally Satisfied Overall is probably quite satisfied with most of the other surveyed elements that influenced that decision, while a dissatisfied individual is likely to have several associated areas of dissatisfaction.

Correlations in the answers to surveys consist of two types, incidental correlations and topical correlations. Topical correlation occurs when there is a logical link among question topics. In the example, there are several areas of query that exhibit this characteristic. As an illustration, consider:

1. The conduct of the service representative during the service call.
2. Responsiveness of the service representative to requests during the service call.

The correlation between these two queries is topical since the major interaction that a customer has with a service representative is usually a request or a question and the evaluation of their conduct would be how well they responded. This suggests that upon inspection of a large number of respondents' answers that a high cor-

relation can be expected to exist between the answers to these two question topics. On the other hand "the time for the service representative to call and set up an appointment" is not significantly related to the prior two question areas and thus it would not be expected to exhibit a topical correlation with either of them. The level of satisfaction indicated for this question, however, will still probably have a correlation with those previous two, but to a smaller degree. This would be the incidental correlation that occurs simply because of a relative consistency in the answers to most questions.

Incidental correlation is background noise that we do have to live with. Topical correlation on the other hand should be minimized. The reason to eliminate as much topical correlation as possible can be understood by the following "thought experiment."

Hypothetically, when building a model to analyze customer satisfaction (for the example used in this article) instead of using one input for each question, suppose you create 10 separate inputs from the answers to first question (the conduct of the service representative). The remaining seven input questions, on the other hand, would be given only one input each. Clearly then this "conduct question" would dominate the logic of the model. Thus, any attempt to understand the objective impact of the conduct question would be highly distorted. It would also dilute the impact of the other questions on overall customer satisfaction. A similar dilutive situation results when there exist significant topical correlations among questions if they are all used as inputs to a neural network.

The goal, therefore, is to minimize topical correlations. Minimization is accomplished by elimination! The challenge is to determine what should be eliminated and what should be saved.

The incidental correlations, on the other hand, will appear in almost every survey, thus there is a normal level that can usually be anticipated. This leads to the fourth rule of thumb:



Correlations below .4 are acceptable (this is typically the upper range of incidental correlation).

Correlations between .4 and .5 are marginal and should usually be eliminated.

Correlations between .5 and .6 are high and should be eliminated if at all possible.

Correlations above .6 definitely should be eliminated.

Correlations above .7 are highly indicative of questions that deal with virtually the same subject (from the respondent's point of view) and must not be used in developing neural network.

It should be emphasized that this rule of thumb applies to a four- or five-level scale and only to inputs, not the potential outputs of a neural network. A higher or lower number of levels will certainly result in different acceptable/elimination criteria.

A simple process for identifying correlation among question answers is to use the correlation function in Excel. This is available in the Data Analysis

Figure 5

Correlation Matrix  
Color Coded Correlation Level

	Request	Appointment	Arrival	Conduct	Result	Communication	First Try	Requests	Overall
Request	1								
Appointment	0.24	1							
Arrival	0.358	0.568	1						
Conduct	0.351	0.33	0.474	1					
Result	0.43	0.333	0.475	0.634	1				
Communication	0.367	0.337	0.508	0.659	0.817	1			
First Try	0.337	0.249	0.454	0.405	0.603	0.724	1		
Requests	0.411	0.353	0.503	0.656	0.71	0.8	0.72	1	
Overall (Output)	0.508	0.455	0.629	0.561	0.669	0.735	0.723	0.747	1

function group listed under Tools. The output is illustrated in Figure 5, which is the result of calculating the correlations for the example.

There are three color overlays to correspond with each of the top ranges of correlation, which visually aid in




identifying those groups. This color coding, or one of your choice, is easily obtained by using the Conditional Formatting capability in Excel.

**What to keep and what to eliminate**  
There is nothing automatic about

Quality Marketing Research Skills Are Here

# PRINCIPLES OF MARKETING RESEARCH

A Distance Learning Course from The University of Georgia

[www.principlesofmarketingresearch.org](http://www.principlesofmarketingresearch.org)

HOW YOU CAN LEARN THE BASICS OF THE PROFESSION for just \$749

## Principles of Marketing Research

### Online Certificate Course

- ▶ Anytime, anywhere access
- ▶ Industry endorsed
- ▶ At your own pace
- ▶ Log on today



"Principles of Marketing Research is the industry's best expression of fundamental and essential best practices for those beginning their research careers."

—Siegfried Högl, Managing Director, GfK Marktforschung

THE UNIVERSITY OF GEORGIA  
CENTER FOR CONTINUING EDUCATION



For information on course enrollment, visit our web site or call +1-706-542-6692 or e-mail [mr@gactr.uga.edu](mailto:mr@gactr.uga.edu).



deciding which questions to eliminate as inputs to the neural network. This selection process requires a reasonable understanding of the subject matter and some trial and error. It is important to note, however, that elimination from consideration as an input to the neural network does not mean that those questions are not included in the ultimate analysis.

The goal is to leave questions that include at least one (often more) which is highly correlated to those which are not used and to have a logical understanding of its relationship to the discarded questions. To accomplish this selection, normally we look for inputs that have the highest correlation with other inputs as a first guess for elimination. In this example, Result, Request, and Communication fit that bill. The next step is to determine if among the remaining, there exists a question that can be a proxy for the removed items. A high correlation is the clue for identifying it. In this case, it is Conduct. A further examination of that correlated group suggests that the common denominator is information about the Result of the service call.

The correlation that inputs have with the output, as seen in Figure 5, can also be used as additional information to aid in the selection of the final question set. Those that have a high level of correlation with the output should be given precedence where possible.

The final reduction is illustrated in Figure 6 with shading covering those questions that will not be used as inputs to the neural network. There is one high value of correlation that could not be eliminated. That is the relationship between Arrival and Appointment. This does happen occasionally and fortunately is not fatal.

A reasonable question to ask is: Does this process always work? The answer is that it rarely doesn't. This does not mean that the first guess for selecting the inputs will always be the best. Very occasionally, we will have to redo the entire analysis. The indication that it should be considered is when the proxy question turns out to

have the highest impact on the output by a significant margin over the next input. The approach in this case is to initially eliminate those inputs that were shown to have little effect on the output and then, to create the correlation matrix again and reselect a new set of inputs for the neural network.

### Segmenting the survey respondents into logical groups

When using a neural network for identifying input sensitivities the non-linearity of the result must be considered. This means that, an "average" sensitivity for each input element over all respondents is probably inappropriate. Different groups of respondents can have very different decision processes, therefore it makes sense to assemble them into logical segments and derive average sensitivities separately for each of those segments. The details of this process will be explained in the third segment of this article.

of groups when working with a neural network in most survey situations. This is the fifth rule of thumb:

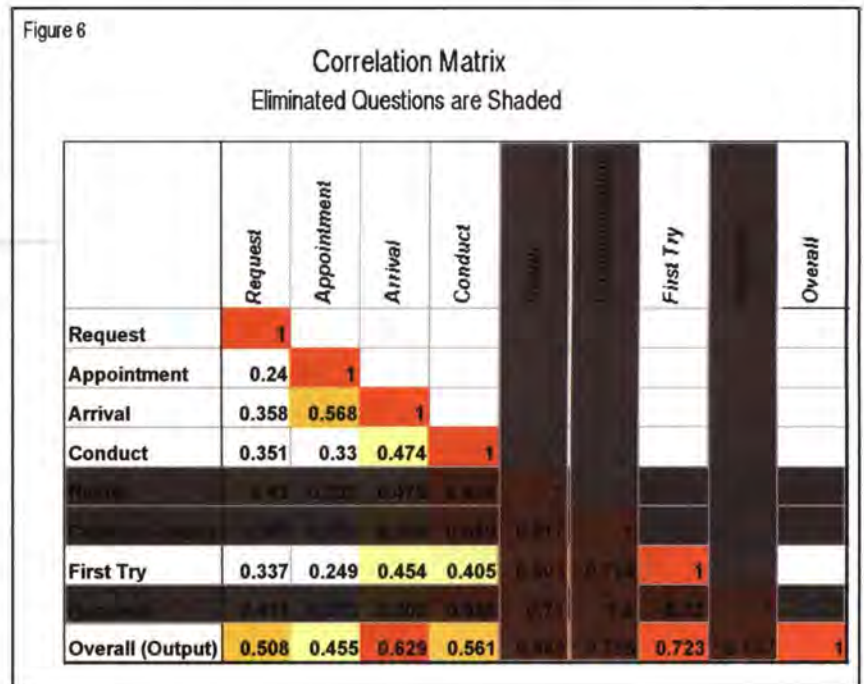
*Usually, the optimum number of groups that can be separately analyzed will be two to five.*

Although this number may seem small, the total number of respondents in each segment is what creates the limitation. Ideally there would be about 80-100 respondents, as a minimum, in each group. With 200 survey respondents, for example, two groups is the reasonable maximum.

In the case of this customer satisfaction example, the segments would be:

1. Totally Satisfied Customer
2. Somewhat Satisfied Customers
3. Dissatisfied Customers (a combination of the Somewhat and Totally Dissatisfied Customers)

The final data set selected for this analysis consists of 104 Totally Satisfied respondents, 92 Somewhat Satisfied, and four Dissatisfied. This selection was derived from the total survey responses to balance the first



There is no standard methodology for determining the optimum segmentation of the respondents. The choice will depend upon the analysts' experience with the specific fields addressed by the survey. There is, however, a practical rule of thumb for the number

two categories and to have a small but representative group of the Dissatisfied. The inclusion of the Dissatisfied group would normally be questionable, however it is part of this example for illustrative purposes. It is used only in creating the neural net-



# ARE YOU REALLY FULL SERVICE?



*Are you in position to bid on any survey project?*

*Are you forced to use multiple vendors for each aspect of data collection?*



*Provide your clients with:*

- Sophisticated, customized, limitless online surveys
- Wireless intercept surveys using voice recorder for open-ends
- Inbound, voice recognition surveys
- Point-of-experience, touch screen surveys
- Online focus groups
- Faster turnaround time



*SmartRevenue will provide you with:*

- Full programming services
- 24x7 support
- One central system for all data collection modes
- Real-time data tracking/reporting
- SPSS data files
- Customized banner reports
- The ability to compete for any project using top-of-the-line technology!



*For more information:*

*Contact Bill Jeffries at 301-770-8600 x 401*

*Email us at [sales@smartrevenue.com](mailto:sales@smartrevenue.com)*

*Visit us at [www.SmartRevenue.com](http://www.SmartRevenue.com)*



Figure 7

**Average Satisfaction Level of Customer Segments  
Based on a 1,3,4,5,7 Weighting**

Customer Segment	Question				
	Request	Appointment	Arrival	Conduct	First Time
Totally Satisfied	1.95	2.73	2.02	2.45	1.35
Somewhat Satisfied	2.67	3.57	3.25	3.02	2.80
Dissatisfied	4.36	5.27	5.09	5.14	5.45

work, not in the analysis.

**Scaling the inputs and outputs**

Although the respondents' choices for selecting a customer satisfaction level are often given as literals, such as in this example, the neural network requires numerical values. The selection of a specific number for each level in the satisfaction scale, therefore, is important. The first step is to identify the key segments of the data. Since the intent in this example is to select the optimum actions to create the maximum number of Totally Satisfied customers, it and the Somewhat Satisfied segments are the most critical. The Dissatisfied group is small to begin

with and will probably respond to any corrective actions applied to the Somewhat Satisfied group.

The goal, therefore, is to assign numerical values to maximize the quantitative distance between the key groups, to allow a greater range of discrimination. This results in a somewhat non-intuitive solution, as usually higher numbers are associated with higher levels of satisfaction. Our approach is the reverse, as indicated in the following selection.

- Totally Satisfied = 1
- Somewhat Satisfied = 3
- No Opinion = 4
- Somewhat Dissatisfied = 5
- Totally Dissatisfied = 7

Since the neural network is structured to deal with ratios, the distance (ratio) between Totally Satisfied and Somewhat Satisfied is 3 (3/1) while the distance between Somewhat Dissatisfied and Totally Dissatisfied is 1.4 (7/5). The "No Opinion" answer must be represented as it is a valid answer and therefore it is squeezed between Somewhat Satisfied and Somewhat Dissatisfied in an attempt to minimize its impact. Since it is necessary that every input of every respondent used to train or test a neural network have a numerical value, No Opinion could also be used for a question that the respondent chose not to answer.

Using the substitution of the values 1,3,4,5,7 for the literals allows us to calculate an average for each of the selected inputs for the three key segments. This is illustrated in Figure 7.

**The neural network (finally)**

The preparation and selection of the inputs constitutes the majority of the work, as clearly indicated in this arti-

**Gain Cost Effective, Rapid Market Insight with your Own Online Panel!**



**We Build and Manage Custom ePanels for you, at a Fraction of the Cost and Time of other Approaches.**

**Let Communicate Partners help you:**

- Improve Survey Respondent Access and Response Rates
- Lessen Study Costs / Turnaround Time
- Execute Virtual Test Labs for Product Design & Concept, Customer Satisfaction and Market & Brand Trackers
- Build Customer Affinity and Profiles

Who would you rather look for market insight, your own custom online panel made of customers and richly profiled prospects, or a dubious email or phone list of people you know nothing about? Getting tired of costly email lists and huge national panels that yield low response rates and thin profiles? Custom online panels, or ePanels, are a cost effective, rapid response and powerful solution. We'll design, build and manage your own online panel to serve a wide range of study types and provide near instant access to hard to find respondents. We work with research firms and end clients on a proprietary or multi-client basis. Move from a rent to own basis for low incidence groups you want to tap for online and offline surveys and discussion groups on a regular basis. Panelists are highly profiled and responsive. Study execution is much more rapid and extremely cost effective. Intelligence is richer,

Panelists, your valued customers, prospects, employees and partners, are well cared for, incented and respected. Execute studies using us for programming, fielding or full service. Or, use your own in-house web capabilities, favorite research provider or consultant. Tap the experts at Communicate Partners, whose principles have helped build 15+ custom ePanels for leaders like Expedia, Washington Post, P & G Verizon, Ziment Research, and C & R Research. To learn more, please contact Chris Yalonis, President, at 415-453-9030 or visit [www.CommunicatePartners.com](http://www.CommunicatePartners.com)





cle. The derivation of neural networks from these inputs, on the other hand, is somewhat automatic.

We have chosen BrainMaker, from California Scientific Software, as our "engine." The advantage that BrainMaker offers for our process is that it has the ability to control network configurations and training strategies. Most important, however, is that it also has an option called GTO (genetic training option) that allows us to predefine a range of alternatives to be iteratively implemented during a series of training sessions. Without this capability, as will become apparent, the development of the thousands of neural networks that are necessary for a proper analysis would be overwhelming.

The fundamental calculation derived from a neural network analysis is a value for the sensitivity of the output (Overall Satisfaction in the example) to each of the separate inputs. This derivation is required for each of the key segments. As could be expected, the sensitivities of each input will usually vary considerably from segment to segment.

While different neural network software programs have a number of strategies for calculating sensitivities, BrainMaker varies each input by 10 percent of its range (maximum value - minimum value) and calculates the fractional change in the associated output. This calculation does not, however, directly provide the sensitivity in a format that we can use.

What is sensitivity? The goal is to determine a dimensionless number that has a consistent calculation for both the input and the output. While there are several options, we use the ratio of:

$$\text{Sensitivity (or Impact)} = \frac{\text{Percent Change of the Output}}{\text{Percent Change of the Input Variable}}$$

For each segment there will exist an average value for each input. Since the individual range of these inputs is also known, dividing (in the specific segment) 10 percent of that range by the average input value will calculate the "Percent Change of the Input Variable." In a similar fashion,

BrainMaker has a function that will display the change in the output corresponding to each standard input variation (10% of the range), one at a time. This value divided by the average value of the output for each segment defines the "Percent Change of the Output."

#### **The fundamental strategy for developing a neural network for survey analysis**

There is a major difference when

developing a neural network to analyze a survey, as opposed to deriving a model. When building a model you seek to identify the statistically best network. When used for analysis, the objective will be different, in that your goal is to find the most "representative network." This is usually not the "best" network. The reason for seeking what we refer to as a representative network stems from the limited number of survey respondents that are usually available.

**What's important to your customers?**

**What do your employees think?**

**What do your members want?**

# DO YOU KNOW?

## Apian SurveyPro 3.0<sup>®</sup>

### **The complete software tool for professional surveys**

Design surveys quickly, using custom or built-in elements, and create polished layouts for paper, Web, e-mail, telephone, and scannable forms • Enter or import responses into the automatically generated database • Explore your data with interactive tools and special functions for cross-tabs, subgroups, 360s and text analysis • Create presentation-quality reports with tables, pie charts, stacked bars, text, and headings, then distribute as paper or HTML

## Apian SurveyHost<sup>®</sup>

### **Full service, full-featured web surveys**

Experienced staff offer advice on creating the best respondent experience for your project • Projects are extensively tailored to match your company's look and feel • Configurations can range from simple forms to complex instruments with password protection, branching, and multiple language versions

**Apian** 

Now. You know.

TEL (800) 237-4565 x2

WEB [www.apian.com](http://www.apian.com) EMAIL [sales@apian.com](mailto:sales@apian.com)



Most suggestions for building neural networks recommend that 10 percent of the data be used to test a network that was trained with the other 90 percent. Unfortunately, this portion of the respondents' answers for testing is not sufficient for a small survey sample, therefore as the sixth rule of thumb we recommend that:

*The minimum number of respondents used for testing is 80.*

*Testing data should consist of a minimum of 40 percent of all of the respondents.*

The logic behind this rule of thumb is that the statistics for defining the characteristics of a neural network are derived from the "testing data," thus it should be a "statistically robust" group.

This rule of thumb was derived empirically from hundreds of frustrating experiments. The early conclusions were disheartening, as the recommended 10 percent testing sample most often gave very poor and even incorrect results. It became apparent quite quickly that the size of

the testing group had to increase. As this testing sample increases, however, the training sample decreases and the major source of the statistical error begins to shift to the training group.

In solving one problem, as in life, you typically create another, and this was no exception. Since often a network is being built with as few as 200 survey respondents, by providing a viable number for testing you also introduce some interesting statistical biases in training, or vice versa. The rule of thumb then arose as a compromise but unfortunately with a sacrifice in statistical accuracy.

The strategy that was identified to overcome that issue was to initially create a very large number of separate neural networks. This is accomplished by a re-randomization of the survey data; then training, testing and creating additional networks. What was anticipated to emerge from the aggregate of all the networks, assuming the number is sufficient, will be a pattern pointing to

a "representative network."

### **Creating the iterations of the data for training the neural network**

To create the multiple networks which are needed to optimize the probability of finding a common central pattern, it is necessary to develop a number of fundamentally different networks from the same data.

The discussion to explain this process will reference the capabilities of BrainMaker's GTO. It will be general enough, however, to be applicable to other neural network software packages. The major options, other than a re-randomization of the respondent data and the subsequent splitting of it into training and testing sets, are the training strategy and the network architecture.

Training is enabled by a property called tolerance. In BrainMaker, tolerance is defined as a specified percentage of the range of the output. In training, a correction is only

## *"The Perfect World of Internet Interviewing"*

### **Compliment Your On-Line Panel with On-Site Internet Interviewing**

Do you know who is really completing your on-line interview?

Is your commercial really being viewed properly?

Is your quota still short that "needle in a haystack" respondent?

***On-Site Internet Interviewing can solve these problems for you!***

Qualified respondents are pre-recruited or intercepted and interviewed in a supervised face-to-face setting.

Concept boards, taste tests, commercials are administered with controlled exposure.

On-Site recruiting, interviewing and supervision is cost effective for studies requiring controls and special quotas.

***On-Site Internet Interviewing***

Call 800-336-0159

for details and immediate  
cost quotations



**Consumer Pulse, Inc.**

13 Nationwide locations with multi-media networked PCs with broadband access



Figure 8

### Impact (Sensitivity) of Inputs on Output Somewhat Satisfied Respondent Group

NN Run	Question				
	Request	Appointment	Arrival	Conduct	First Time
Run 1	0.20	0.08	0.41	0.23	0.34
Run 2	0.16	0.08	0.14	0.32	0.22
Run 3	0.24	0.32	0.29	0.34	0.21
Run 4	0.30	0.27	0.32	0.22	0.71
Run 5	0.33	0.13	0.18	0.16	0.40
Run 6	0.29	0.25	0.32	0.24	0.72
Run 7	0.35	0.15	0.26	0.62	0.32
Run 8	0.34	0.19	0.18	0.52	0.42
Run 9	0.28	0.18	0.15	0.22	0.51
Run 10	0.30	0.21	0.29	0.16	0.61
Run 11	0.31	0.15	0.32	0.21	0.53
Run 12	0.19	0.12	0.24	0.11	0.33

made to the network if the output for any set of inputs exceeds that tolerance. This tolerance can be set to a constant or a dynamic value that decreases in a predetermined pattern as the network increasingly learns from the training facts.

The network architectural variability comes from the number of layers of hidden neurons in combi-

nation with the number of neurons in each of those hidden layers. From a practical point of view, and also a limitation of BrainMaker, two layers of hidden neurons are the maximum that can be used.

#### Stipulating the iterations for developing multiple networks

As implied in the previous section,

the crux of the process for identifying the representative network lies in the ability to generate a sufficient number of different networks from the same data to insure that a rational representative pattern will emerge in the aggregate results. The following is a description of the methodology that BrainMaker allows us to use.

Labeling the criteria as rules of thumb is a stretch, so instead, consider these alternatives as "what works well for us."

1. In training, reviewing all survey respondents in sequence 210 times is usually sufficient. This is called a training cycle.

2. Test after reviewing the complete sequence of survey respondents every 30 times (seven times per training cycle).

3. For the fixed training strategy, a training tolerance of .1 (10 percent) works well.

4. For the variable training strategy, a beginning training tolerance of .2 (20 percent) decreasing in the sequence

## CULTURAL INSIGHTS into TOMORROW'S MAINSTREAM MARKETS

### Full-service capabilities:

- Multicultural marketing consultation
- Qualitative research—focus groups, on-line
- Quantitative studies—phone, intercept, door-to-door
- Ethnographic studies and techniques
- Hispanic, African American, Asian American markets

**Call us. 213.228.0300**

David R. Morse, *President* 213.228.0301 dmorse@accesscag.com  
 Susanna Whitmore, *Director of Sales* 213.228.0315 swhitmore@accesscag.com  
 Thomas Tseng, *Director of Marketing* 213.228.0312 tdttseng@accesscag.com  
 Raul Lopez, *Chief Operating Officer* 305.971.1437 rlopez@accesscag.com





.16 (16 percent), .13 (13 percent), and .1 (10 percent) is effective. Each successive step is taken when the network is trained such that 90 percent of the training facts are within the current tolerance.

5. For the first hidden layer, start with the number of neurons equal to 25 percent of the inputs and continue by adding two neurons in each new training cycle until it is equal to 120 percent of the inputs.

6. Add a second hidden layer using the same strategy as the first hidden layer.

7. Iterate until you have used all possible permutations of the previous alternatives (1-6).

8. If the total number of training cycles exceeds 100 consider increasing the two-neuron increment to three or four.

With a total number of cycles that could equal 100, there might then be 700 potential tested networks to choose from. This number, however, is only for one split of the survey respondents between testing and training. In fact the respondent base should be reshuf-

fled at least four or five times, as a minimum, and retrained each time using the parameters defined above. This generates a maximum of 2,800-3,500 tested networks. Although the development of all these networks sounds ponderous, it really isn't. The entire process including selecting the appropriate networks (exclusive of computer time and data preparation) takes slightly over an hour.

### What is the result of all these calculations?


The selection methodology is a two-step process. The first is a preliminary reduction. From each re-randomizing of the surveys and subsequent training of multiple networks (about 700 networks), three are chosen that exhibit "optimum statistics" (to be discussed in the third article).

For explanation, (using the example) we will assume four re-randomizing sequences. The results, after normalization, are illustrated in Figure 8. Only the table for the Somewhat Satisfied group is shown here. Similar tabular results exist for the Totally Satisfied and Dissatisfied. There are 12 selected "best networks" shown. Each row (of the 12) defines the impact or sensitivity for each input (the satisfaction element) on the output (Overall Satisfaction). The ratio is given as a percentage. By examination of Figure 8 it is important to note the extreme differences in sensitivities of the inputs in some of the 12 selected networks!

Like a good soap opera, we leave this second article with a cliffhanger. Observing the dramatic differences that can occur in the outputs of neural networks developed from the same data raises two "sticky" questions.

1. If you presently use neural networks for analyzing surveys without consideration of the issues raised so far in this article, "Are you feeling lucky?"

2. Given this apparent variety of results, how do you identify the correct representative network?

Although the selection process was originally slated for discussion in this section, it is postponed until the third article. Tune in for the explanation in the October issue. 

# SensusWeb

Advanced Web interviewing using the same questionnaire authoring language as WinCati and CIB CATI. Create your survey once and use it in either a Web or a CATI environment — or both.

**Provides:**  
**CATI-like**  
**questionnaire**  
**capabilities,**  
**Quota controls,**  
**E-mail functionality,**  
**Straightforward**  
**deployment,**  
**and more....**

**Plus, we now offer**  
**Web hosting and**  
**deployment services.**

**Sawtooth Technologies**  
**Best Practices.**  
**Best Value.**

**www.sawtooth.com**  
**(847)866.0870**





## HOCKEY PLAYERS WHO NEEDLEPOINT

Find Them Faster and Easier.  
And Find Them for Less.

### POLK'S RESEARCH SAMPLING

Polk's Research Sampling experts provide the market research industry with the richest and most versatile samples, giving researchers the flexibility to quickly and efficiently conduct statistically sound research. Let us help with your next research project.

#### The Polk Advantage

- Over 200 selection characteristics
- Targeted Samples
- Customized Orders
- Competitive prices
- Quick turnaround
- Knowledgeable account executives

Call Polk Today! 888-225-1434

**Polk**  
Automotive Intelligence™





*Editor's note: Tim Glowa is a president of North Country Research, a Calgary, Alberta marketing science company. He can be reached at [tim.glowa@ncresearch.com](mailto:tim.glowa@ncresearch.com).*

**S**elf-completed Web surveys offer many advantages, including lower data collection costs, shorter data collection time periods, enhanced survey controls (namely automated skip patterns or forcing responses when applicable), and reduced data entry errors. But the enormous potential of Web surveys must be balanced against an equally large weakness. Most North American households do not have computers or Internet access. In October 1998, only 42 percent of U.S. households reported owning a computer, up from 24 percent in 1994. Another study, conducted by CBC/New York Times in 1998 suggest-

ed that two-thirds of all households contacted have access to a computer, and a third of these respondents have Internet access (Dillman 2000, *Mail and Internet Surveys*). While the proportion of the population with Internet access will continue to increase, the issue of valid coverage is an important consideration when conducting a Web survey.

This article reviews Web survey software from three providers. Each piece of software was used to create a simple Web-based survey. In conducting this review, the author imposed several constraints:

- The same short questionnaire was used in all cases.
- The survey was created by the author using each piece of software, and hosted on a site not affiliated to the software provider.
- Each survey was tested to ensure

that respondents could complete it online.

- Each software program was used on the same computer (running Windows 98).

The software packages reviewed are: SSI Web (Sawtooth Software), The Survey System (Creative Research Systems), and Survey Pro (Apian).

There are several features that are common to all software packages. First, they all provide a detailed instruction manual that is surprisingly easy to use and follow. Second, they all have very friendly technical support that is available without charge over the phone. In each case, I contacted technical support and asked questions about actually hosting or publishing the survey, and received courteous, helpful advice. Third, all packages are relatively similar from a functionality perspective; they



# DISCRETE CHOICE MODELING Over The Internet

## ■ Tradeoff Analysis

Discrete choice modeling, or choice-based conjoint, is a powerful way to conduct "tradeoff" analyses to optimize brand strategies, product designs, new product concepts, promotional offers, and pricing options.

## ■ Simulation

Discrete choice and conjoint outputs are translated into an easy-to-use computer simulation tool that allows our clients to play "what if" games by manipulating marketing inputs.

## ■ Worldwide Internet Panels

We have over 3.5 million consumers in worldwide Internet panels ready to help you optimize your marketing plans. Let us help you exploit the potential of the Internet.

Call 1-800-ANALYSIS

for more information

or visit our website at:

[www.decisionanalyst.com](http://www.decisionanalyst.com)

FREE! To download STATS™ 2000 statistical software, please visit our website at:  
[www.decisionanalyst.com/download.htm](http://www.decisionanalyst.com/download.htm)



**Decision Analyst, Inc.**

*A global leader in Internet research systems*



all allow skip patterns, optional response verification to ensure that certain questions are answered or that the response is in an appropriate range, and finally they all provide the ability to show answers to previous questions on the screen (for example, "You mentioned that the last quick-service restaurant you ate at was Burger King; how satisfied were you with their speed of service?")

**SSI Web**

SSI Web from Sawtooth Software is an excellent Web survey software package. Although expensive compared to the others reviewed — \$3,000 for 50 questions, \$9,000 for the 500-question version — it is relatively easy to use. A survey is created using either a template or by pointing and clicking and typing in text. It is very easy to change the order of questions or to add graphics.

One of the strengths of this package is the format for laying out and displaying questions; you simply enter your questions and possible responses, and Sawtooth Software handles the formatting and questionnaire layout, while providing the ability to change this formatting if desired.

Of the three packages reviewed, SSI Web also has the strongest survey preview feature, which opens the survey in a separate window and shows how it will actually appear to potential visitors. This is extremely useful to adjust any formatting or page breaks.

Another strength of this package is the online data management module. It allows a researcher to not only monitor

that they can tabulate frequencies, but not provide the ability to change or adjust password quotas (the read/write capability requires a separate password).

A separate add-on module integrates SSI Web with Sawtooth Software's powerful conjoint packages.

**The Survey System**

The Survey System is an extremely versatile collection of software packages. With the Basic Edition (\$499), users have a complete survey creation and analysis system for questions with 10 or fewer answer choices. Questions are constructed using drop-down menus and help wizards that are common to

tions, combine Web responses with other information from the same respondent (such as historical data), and the flexibility to establish different quotas for different groups of respondents.

One of the nicest features is the built-in spellchecker. For those of us used to having this feature in Microsoft Word, it is comforting knowing that the chance of a typo is reduced. Also, a range of different questions types can be used, including grid-style tables.

The Survey System has two main strengths. The first is the ability to produce professional, camera-ready reports (complete with tables, charts and text) on a Web page. This feature demonstrates

The Survey System from Creative Research Systems ( <a href="http://www.surveysystem.com">www.surveysystem.com</a> )	
Item	Rating out of five
Ease of entering questions	* * *
Ease of changing/editing questions	* * *
Ease of publishing survey	* * * *
Ease of retrieving data	* * * * *
Price	* * *
Technical support	* * * *
Overall rating	* * * *

many Windows-based software packages. The Basic Edition of The Survey System is designed to appeal to all users; those outside of the traditional market research departments can easily create a simple survey, while market research professionals will appreciate the added analytical tools available from an add-on statistical module.

For larger surveys and more sophisti-

the advantage of Internet-based surveys — the ability to quickly collect the data and quickly produce quality topline reports.

The second strength of this package is the e-mail integration package. Although your ISP may not appreciate (or in some cases may even forbid) the sending of bulk unsolicited e-mail, this feature does provide the ability to manage the e-mail invitation process, including the inclusion of passwords in the link so that respondents do not have to enter them, and the ability to send either reminder messages to non-respondents or thank-you e-mails to those who have. This feature will be very useful to researchers who are using a managed database of people who have agreed to participate in future research projects.

A separate optional add-on module lets users record respondents' answers in their own voices.

**Survey Pro**

The Survey Pro package from Apian software is a complete data collection

SSI Web from Sawtooth Software ( <a href="http://www.sawtoothsoftware.com">www.sawtoothsoftware.com</a> )	
Item	Rating out of five
Ease of entering questions	* * * *
Ease of changing/editing questions	* * * * *
Ease of publishing survey	* *
Ease of retrieving data	* * * *
Price	*
Technical support	* * * * *
Overall rating	* * * *

responses but also to calculate frequency counts providing a convenient method of monitoring the progress of the survey. Additionally, a researcher can also provide a password to a client, so

cated users, The Professional Edition of The Survey System is reasonably priced at \$999. There are several unique features to this package, including the ability to calculate values from other ques-



package that can be integrated with Apian's other modules. The main survey design package costs \$1,195, and the add-on NetCollect module is \$595, putting the total price for a single-user license at \$1,790.

Since this package is part of a total

straightforward.


### Publishing the Web survey

Although Survey Pro was the easiest, the process of hosting or publishing the survey was more challenging than I expected. Each piece of soft-

ware, while your ISP would suggest contacting the software manufacturer.

In any case, it is possible to publish your own survey. However, if this seems like too daunting a process, each of these software companies offers a fee-based hosting service, where you design the survey using their software, and then for a fee, they will host it on their own servers — an acceptable solution if you do not have the time or inclination to do it yourself, but still want to conduct Web survey research. Contact each of the providers for more information.

### Here to stay

Web surveys are certainly here to stay, and will likely become more and more accepted as a mainstream data collection option. Of the three pieces of software reviewed in this article, two are excellent options for the researcher interested in designing their own Web survey. SSI Web is an easy-to-use but powerful survey design and hosting package that provides all the tools necessary to conduct Web surveys. The Survey System is also a superior product that is easy to use and not only creates Web surveys but also provides the tools for quick and professional analysis and reporting all in one package. I would not hesitate to recommend either package. 

Survey Pro from Apian Software (www.apian.com)	
Item	Rating out of five
Ease of entering questions	• •
Ease of changing/editing questions	•
Ease of publishing survey	• • • • •
Ease of retrieving data	• • • •
Price	• •
Technical support	• • •
Overall rating	• • •

survey data collection system, it allows the user the flexibility to quickly change from a Web-based survey to a paper survey. However, this functionality makes creating and formatting the Web survey cumbersome. Unlike the other software tools, formatting or editing questions (including changing the order of questions) is not easy.

Alternatively, the strengths of this package are first the ability to quickly integrate the respondent data into a finished report. The report produced is based on a template designed by the user, and can be instantly assembled with topline information once data collection is completed.

Secondly, of all the packages reviewed, Survey Pro is the easiest to host. The process of completing the questionnaire and actually getting it up on your Web site is simple and

software requires the uploading of different script files and will likely require the use of a file transfer protocol (FTP), a method used to upload and download pages from a Web server. I used Ipswitch's WS\_FTP Pro (available from [www.download.com](http://www.download.com) or [www.tucows.com](http://www.tucows.com)) for this. If you have previously published a Web site using Microsoft FrontPage and are looking for a "Publish Web" button, you will be sadly disappointed.

Part of the problem is that specific requirements among ISPs vary. One provider may require a separate setting accepting perl files, while another requires that all files be uploaded to a common location. This has the potential for the user to be left in the middle, caught between the software maker and the Internet provider. The software company would suggest that you contact your ISP if you have prob-



For a review of three sophisticated data analysis packages, visit [www.quirks.com](http://www.quirks.com) and enter Article QuickLink number 565 ("Analytical software extends its reach").



*we didn't plan to be a "best kept secret"*

Since the word is out, you should know that we do more than world class marketing research. Burke offers a broad range of decision support services for marketing, operations, quality, and human resources. We acquire, integrate, analyze, and most importantly **apply** knowledge across your enterprise. *Now, go spread the word.*



*Applying Knowledge  
Improving Decisions™*



# My opinion counts



*Online  
research  
from the  
participant's  
perspective*

By Mary Beth Solomon

*Editor's note: Mary Beth Solomon is a New York-based independent qualitative research consultant doing business as MBS Consulting. She can be reached at [marybeth@MBSconsult.com](mailto:marybeth@MBSconsult.com).*

**M**ore than a source of entertainment, a stealthy way to monitor the purchasing habits of American citizens, or just another way to advertise, online research is an avenue through which companies large and small learn more about their brands and forge relationships with customers. Within the last few years,

online methodologies have become stops on the path toward a company understanding its consumers and managing customer relationships. But this communication goes both ways; while companies can “talk” to their customers, it’s also a way for consumers to tell companies what they think of the products and services they use. If customers have gripes, for instance, about the new flavor of iced tea from Snapple, or the latest look in sneakers from Nike, they have the opportunity to air their views, and to get paid for doing so. And those who are a little more tech-savvy —

the experienced Web surfers — can talk about their views on everything from their favorite (or least favorite) Web sites to online privacy and Web site registration.

Like many industries, market research companies have taken the business of polling online. In one month alone (March of 2001), online market research software developer Itracks had a 74 percent increase in hosting online qualitative research than the same month in the previous year. Another company, New York-based Cyber Dialogue, Inc., began by offering businesses a chance to reach



# Introducing Net-MR 2.0

The world's most advanced  
tools for market research  
management

**N**et-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

Panelist Registration  
Profile Management  
Customer Service  
Respondent Portal



**Panel Management**



**Data Collection**

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

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



**Analysis and Reporting**

## GLOBAL MARKET INSITE

E-BUSINESS SOLUTIONS FOR GLOBAL MARKET RESEARCH

FOR MORE INFORMATION PLEASE CONTACT [INFO@GMI-MR.COM](mailto:INFO@GMI-MR.COM)  
OR VISIT US ON THE WEB AT [WWW.GMI-MR.COM](http://WWW.GMI-MR.COM).





their customers in a non-invasive way while simultaneously giving consumers the chance to give opinions on a variety of topics — and get paid for doing so. Many other companies emerged as companies recognized the value of conducting research online. Since 1993, Cyber Dialogue (now Fulcrum Analytics, Inc.) implemented focus groups and surveys online for Fortune 500 companies, Web site content providers, and other types of organizations, to find out what the online population was thinking. Out of this research emerged some “research on the research” to find out what Internet users actually had to say about the projects in which they participated. It turned out that they had a lot to say.

An online survey Cyber Dialogue conducted in the late '90s, for instance, showed that the Internet had begun to replace the television. It appeared that the couch occupant went from sitting in front of the TV to sitting in front of a computer screen. (In fact, some claimed to be reading less and sleeping less as well.) A recent release from Jupiter Media Metrix reported, too, that among specific demographics (in this case women with children) 44 percent have reduced their TV viewing in

favor of spending time on the Internet (April 18, 2002, Jupiter Media Metrix Online Behavior & Demographics service “Demographic Profile: Women Online”). In light of these facts, it's easy to understand why online users have sought out new opportunities to capitalize on the time they spend online.

Interestingly, when online research participants were asked why they enjoy participating in online surveys or research projects, the top reason that emerged was not the money-making opportunity, but rather the chance to make their opinions count, as in the following quote from a 12-year-old: “It makes me feel important. Being a kid, sometimes I feel like whatever I say doesn't count. But this makes me feel like I count.” Some did say that getting paid is important, while a few mentioned “interacting with others” as an incentive. Interestingly, the self-fulfilling or contribution-focused reason is most often mentioned, followed by the bonus of earning some cash; bringing up the rear is the social connection factor.

There was also a strong sense of empowerment embedded in many of the comments, a sense that they are “being heard,” as in these verbatim

quotes:

- “I feel like I have a voice in things...”
- “I feel that my opinion is instantly being heard.”
- “I feel my opinion is less mainstream than most, and want my voice to count.”
- “I like the fact that...I can have an effect on products or services being offered by different companies.”

The effects of feeling heard cannot be overstated. The Internet has, to some degree, removed some barriers while building others. It allows for immediate connections between business and consumer and vice versa while also engendering concern in some online users. For instance, issues of privacy, security, and personal vulnerability are among the topics that surround discussions about how the Internet has impacted and will continue to impact both personal and business interactions. Today's savvy consumer has become increasingly frustrated at having to remain on hold on the telephone for 20 minutes waiting for a customer service representative to answer their call “in the order in which it was received.” Providing customers with the sense that a company is genuinely listening serves not only to break down barriers but also to reduce frustration, offer alternate access points to customer service, and again, make each customer feel valuable. The farther-reaching effect of these processes, of course, is that these good feelings are likely to turn into dollars spent and profit gained.

OK, so it might seem that the same goal can be reached through mall-intercept methods of market research, traditional focus groups, or telephone surveys. Well, online research participants have something to say about that, too. One respondent described why she likes doing online surveys: “[I have the] ability to fill out projects at the time that I decide rather than being forced to answer questions by phone when it is often inconvenient.” One of the greatest mutual benefits (to both customer and company) just



**We deliver them every time.**



Tragon consistently puts you in touch with even the hardest-to-find consumer, youth, business, tech, medical, legal and financial respondents. That's how we've built our reputation, from focus groups to surveys to product testing to advanced statistical modeling.

Contact us today for your next research project at **800-841-1177** or **www.tragon.com**.



might be in the nature of the online environment in the sense that its anonymity can lend itself to honesty. (As one online respondent explained, "[I] can be honest without face-to-face peer pressure.") After all, isn't it better to have an honest answer from someone you can't see than a less-than-honest response from someone you can? (Yes, the honor system applies in both online and face-to-face groups!)

So while it's clear that online research offers advantages and disadvantages to marketers, the same applies to the respondents. Below is a summary of some of the perceived pros and cons:

#### Pros

- Making opinions known — allows participants to make an impact on changes in products, brands, and services.

- Feeling heard — diminishes the feeling that they are part of a mass consumer market, contributes to a sense of empowerment and participation in a process.

- Money — perceived as an added bonus.

- The "lone voice" — allows participants who have opinions that diverge from the mainstream to contribute to commercial decisions that impact the consumer who is not necessarily part of the majority.

- Convenience — allows participants to contribute opinions on their own schedules, or to participate from a comfortable and familiar location (i.e., home, work, school).

#### Cons

- Not always knowing who is sponsoring the research — and to whom they are contributing their opinions.

- Awareness of only part of the process — participants offer opinions but do not see the results.

- Privacy — there is some concern that personal information will be shared with non-participating parties or organizations.

- Not always being selected — this comment comes from the perspective

of an individual who clearly enjoys participating.

#### Mutually beneficial

Despite the cons, the pros make a strong case for why online focus groups have become an increasingly utilized and helpful tool for gathering qualitative data from online users. The Internet as a research venue has evolved into a mutually-beneficial and convenient tool for establishing and maintaining relationships in both

the business-to-consumer and the business-to-business environments — that is, between any company and its customers. With 210 million consumers projected to be using the Internet within the next three-and-a-half years and \$130 billion in anticipated retail revenues during the same period (Jupiter Media Metrix industry projections), the online medium continues to pave a significant two-way path for customer relationship management. **TM**

## This is *not* what we mean by field management



GroupNet™ is a network of the finest independent research facilities anywhere. Take advantage of one point of contact, to represent you for all your qualitative research needs.

**GroupNET**  
The Qualitative Experts  
Simple. Effective. Smart.

Our GroupNet™ members offer FocusVision™ services.

GROUP-NET.COM



FocusVision™

1-800-288-8226

Atlanta - Jackson Associates, Inc.

Baltimore - Chesapeake Surveys, Inc.

Boston - Boston Field & Focus - Performance Plus

Boston - Framingham - Boston Field & Focus - Performance Plus

Charlotte - Leibowitz Market Research Associates, Inc.

Cherry Hill, NJ - Group Dynamics/Cherry Hill

Chicago - National Data Research, Inc.

Chicago - Northfield - National Data Research, Inc.

Cincinnati - QFact Marketing Research, Inc.

Dallas - Focus on Dallas, Inc.

Denver - Accudata Market Research, Inc.

Detroit - MORPACE International

Fr. Lauderdale - WAC of South Florida, Inc.

Houston - Opinions Unlimited, Inc.

Indianapolis - Herron Associates, Inc.

Los Angeles - Beverly Hills - Adept Consumer Testing, Inc.

Los Angeles - Encino - Adept Consumer Testing, Inc.

Memphis - Accudata Market Research, Inc.

Minneapolis - Focus Market Research, Inc.

New York - WAC of New York

Philadelphia - Group Dynamics in Focus, Inc.

Phoenix - Focus Market Research, Inc.

Portland - Consumer Opinion Services, Inc.

Providence - Performance Plus

San Diego - Taylor Research

San Francisco - Nichols Research, Inc.

San Francisco - Concord - Nichols Research, Inc.

San Jose - Nichols Research, Inc.

Seattle - Consumer Opinion Services, Inc.

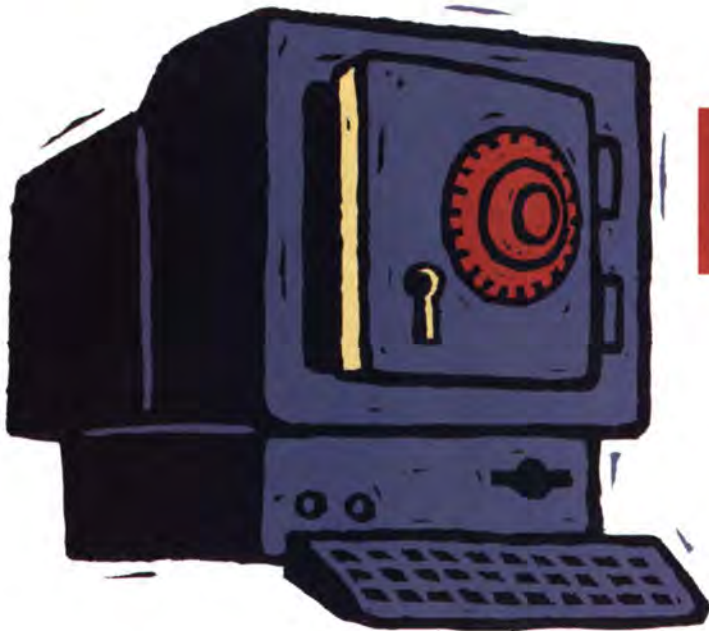
Tampa - The Herron Group of Tampa, Inc.

Washington, D.C. - Shugoll Research, Inc.

United Kingdom - London - MORPACE International



# Privacy, please



Security issues pose  
obstacles to continued  
growth of online research

By Beth Mack

*Editor's note: Beth Mack is president and CEO of i.think inc., a Dallas research firm. She can be reached at 214-855-3777 or at [bmack@ithink-inc.com](mailto:bmack@ithink-inc.com).*

**O**nline market research has found its niche as respondents and clients alike discover the inherent advantages the Internet offers. As a result, the online market research community is flourishing. The newsletter *Inside Research* reports that less than \$3 million was spent in the United States in 1996 on online research. The same publication says that in 2001, that number had soared to more than \$500 million.

The move to online research is attributable to the methodology's promise of

speed and, in some cases, reduced costs. General Mills, for example, has stated that using online methods reduces survey time by as much as two-thirds and saves an average of 50 percent over traditional methods.

The growth of Web-based research has spawned new subject matter for testing, including Web site effectiveness and audience demographics; and the effectiveness of online advertising. At the same time, many traditional research activities have moved online such as qualitative research, concept testing, and consumer satisfaction studies.

This new medium has heightened public concern over privacy and security. Our response to these issues will be critical to the continued success of online

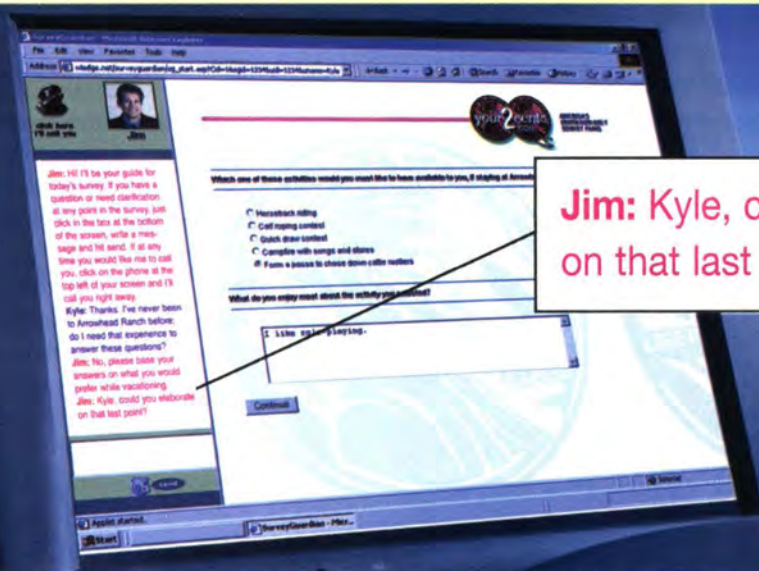
research.

We've always worked hard to maintain the integrity of the data collected and protect respondents' private information. And we've been careful to ensure that the data was kept confidential and, when necessary, locked in secure files.

The Internet has brought those issues to the forefront because of the vulnerability of data stored on unsecured servers. Years ago, we had small worries about the possibility of someone stealing a file, or selling mailing lists without authorization. Now, with servers connected to the Internet, whole databases are at risk of being compromised by hackers, worms, viruses and a whole host of other issues that were unknown a few short years ago.



# Now it's personal. Add live interviewers to your online surveys.



**Jim:** Kyle, could you elaborate on that last point?

**A**S AN INTERNET SURVEY, IT'S CONVENIENT AND USER FRIENDLY. As a personal interview, it's technologically advanced. As your next methodology, it's warm, engaging and surprisingly affordable. Introducing Surveyguardian®, the revolutionary way to cost effectively add live interviewers to your online surveys.

**C**ommon Knowledge is proud to be the first online interviewing service bureau in the U.S. to offer Surveyguardian. This unique technology utilizes carefully trained e-Interviewers who screen out unqualified respondents, probe and clarify open-ends, and encourage higher completion rates. Respondents can even send an electronic request for a personal call from an e-Interviewer.



Surveyguardian®  
e-Interviewing service

**S**urveyguardian's proven results: Better quality data

- 100% qualified respondents
- More informative open-ends
- 40% savings vs. B2B telephone surveys
- 60% savings vs. consumer telephone surveys

**F**or the most advanced online recruiting, data collection and reporting methods, turn to Common Knowledge – your proactive partner in marketing research technology; your silent partner in success. Visit [www.commonknowledge.com](http://www.commonknowledge.com) for more information about Surveyguardian and our other services.

**C**all or e-mail us today, and we'll walk you through the painless process of putting Common Knowledge to work for you.

800-710-9147 • [www.commonknowledge.com](http://www.commonknowledge.com) • [info@commonknowledge.com](mailto:info@commonknowledge.com)

Common Knowledge Research Services, 16200 Dallas Pkwy, Suite 140, Dallas, TX 75248-2684

**DIGITAL DATA COLLECTION™ AND REPORTING SERVICES FOR THE MARKETING RESEARCH INDUSTRY**

**Custom Internet Surveys**

**Interactive Voice Response (IVR)**

**Inclusive™ Survey  
Internet/IVR Combo**

**Online Focus Groups and Internet Assisted In-Depth Interviews**

**Interactive, Real-Time Reporting**

**Surveyguardian® e-Interviewing  
Live Administration of  
Internet Interviews**

**Scanning and Fax-Back  
for Paper-Based Surveys**

**Handheld/Mobile Survey Systems  
for Intercepts or Diaries**



**ONLINE  
OPINION PANEL**

Access to Millions of Profiled  
Internet Households and Businesses.  
Your Programming or Ours.

**COMMON  
KNOWLEDGE**  
MARKETING  
RESEARCH  
SERVICES  
FOR THE  
21ST CENTURY



These issues are making ethics even more important in the online community to ensure that privacy is protected and that clients are served by ensuring the data delivered is trustworthy.

### Trusting relationship

With this in mind, online market researchers have a high level of satisfaction to meet. There are a number of ways through the Internet to accommodate and build a trusting relationship not only with the client, but also with the research respondent. Through developing guidelines, adopting or creating a code of ethics, posting privacy statements, instituting strong security measures and acting honestly, the Internet can serve as the tool of choice for clients and respondents.

Unfortunately, consumers don't have

a lot of confidence in online privacy. A study by Forrester Research found that just 6 percent of respondents — one out of 16 — trusted Web sites with their personal information. There is good reason for them to be worried. Identity theft is rising, and businesses and agencies that retain consumer information are under frequent attack by hackers. A recent FBI and Computer Security Institute study found that 85 percent of companies surveyed experienced Internet security break-ins over the last year.

Because privacy and security are closely related, they are often lumped together. But privacy policies won't solve security problems, and without Internet security, there can be no online privacy.

Privacy is possible if policies and technology are properly coordinated.

The Federal Trade Commission cites four key elements of privacy. Two of them, notice and choice, are policy questions. The other two, access and security, are technology issues.

Notice and choice policies inform people how their information will be shared and allow users to opt out if they don't want that information sharing to occur. If consumers think that notice and choice policies will safeguard sensitive personal information on the Internet — and then discover that their Social Security numbers have been stolen — their confidence in online transactions will be shaken.

Because the online privacy debate has focused on notice and choice policies and overlooked security technologies, the legislative remedies don't begin to address the overriding public concerns about online theft or wrongful manipulation of sensitive personal information.

For example, the Consumer Internet Privacy Enhancement Act, which Congress is considering, has many provisions on notice and choice policies, but none on online security. The Health Insurance Portability and Accountability Act (HIPAA), whose privacy regulations have created such a furor, doesn't address security regulations. Even legislation calling for a privacy commission ignores the need to study Internet security measures.

Fortunately, some privacy legislation does reference security. For example, the Financial Services Modernization Act, which prompted banks to send a torrent of privacy statements to consumers, also requires financial institutions to safeguard customer information, protect the security and integrity of records, and guard against unauthorized access. The new cyber crime initiative pushed by Attorney General John Ashcroft also is a step in the right direction.

### Strong programs

The message is clear. Either we get ahead of the issue and institute strong privacy and security programs within our industry or the government will do it for us. Our industry needs to do a better job of recognizing these are critical

<b>NATIONAL SURVEY INSTITUTE™</b>	<b>1st and Only Projectable Online Omnibus with Multimedia Capabilities</b>
<b>online   POLL</b>	
<b>1-877-674-7655</b>	
<b>www.NationalSurveyInstitute.com</b>	

## ACA/Web Adaptive Conjoint Analysis

In 1985, **Sawtooth Software™** created the first **ACA** software system.

It became the **most widely used conjoint software** in the world.

Now you can deploy ACA surveys **over the Web** on your **own website**.

**ACA** is a **proven technique** for understanding **buyer preferences** and **predicting their behavior**.

Experience a **live ACA/Web survey** at  
**www.sawtoothsoftware.com**



## Sawtooth Software, Inc.

530 West Fir Street • Sequim, WA 98382-3209  
**360/681-2300 • 360/681-2400 (fax)**  
www.sawtoothsoftware.com

**Computer Interviewing • Conjoint • Perceptual Mapping**



issues and take steps to address them within our community. On a national level, we need to educate consumers and elected officials on the link between online privacy and security. On an individual company level, we need to ensure that the data we collect is safe and that our privacy systems are well established.

Privacy notices appear invaluable in helping to ease concerns over sharing information. According to a study conducted in the spring of 2001 for the Privacy Leadership Initiative (PLI), consumers are increasingly paying attention to online privacy statements (82 percent in April 2001 vs. 73 percent in December 2000).

The study also revealed that consumers are more likely to reveal personal information if given an incentive. And while almost half (45 percent) of online users feel business Web sites are better at providing privacy notices, a majority (59 percent) still feel that businesses do not do a good job of informing consumers about what they do with their personal information.

Fortunately, over the past few years, some associations have developed ethical guidelines for the Internet to provide a consensus of what is acceptable in the online world of research. These guidelines can help the online market researcher develop their own set of guidelines for viewing by the client or respondent.

The Marketing Research Association (MRA) is just one of many associations creating an online market research ethical guide. Its Code of Data Collection Standards outlines basic rules to data collection that apply to market research and online market research.

These guidelines include:

- Respondent cooperation should be voluntary.
- The researcher's identity should be disclosed to respondents.
- The respondent's rights to anonymity should be safeguarded.
- Privacy policy statements should be posted online.
- Data security should be maintained.
- Reliability and validity of findings should be disclosed to the public.
- Researchers interviewing minors

should adhere to the Children's Online Privacy Protection Act.

Customer/respondent transactions and consumer confidence are the lifeblood of a business and nowhere is that more evident than on the Internet. But these critical business elements are now under daily attack by computer viruses, online security breaches, and highly publicized hacker invasions, compounded by the threat of cyber-terrorism.

### High confidence

Internet experts agree that the potential of electronic business will not be achieved until businesses and consumers have high confidence that the transactions they conduct — and the sensitive data they place on the Web — are safe and secure. Implementing the MRA's suggestions above and rigid implementation of privacy policies will go a long way toward ensuring continued growth of our industry. **74**

J. RECKNER ASSOCIATES, INC.

"I was looking  
for more than a  
national data collection company...

I was looking for  
a partner."

### Offices:

- New York
- Milwaukee
- Philadelphia

JRA provides the total solution for all your needs between design and analysis. Our expertise with medical, business to business, and consumer populations insures the successful completion of your quantitative and qualitative studies

*Would you expect anything less from your partner?*

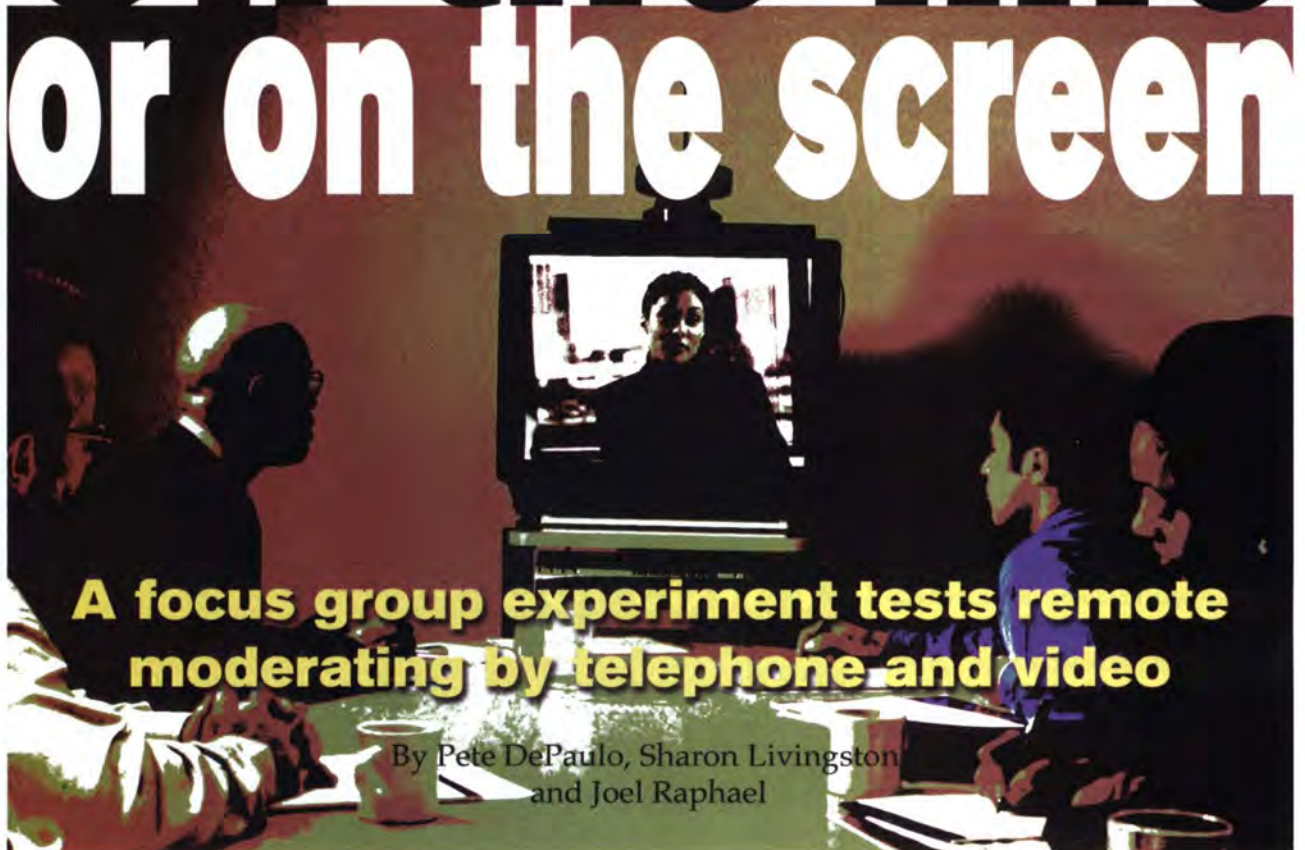
**JRA**

J. Reckner Associates, Inc.

Corporate Headquarters  
587 Bethlehem Pike,  
Suite 800  
Montgomeryville, PA 18936  
(215) 822-6220  
(215) 822-2238 fax  
www.reckner.com  
info@reckner.com



# On the line or on the screen



## A focus group experiment tests remote moderating by telephone and video

By Pete DePaulo, Sharon Livingston  
and Joel Raphael

*Editor's note: Pete DePaulo is an independent research consultant based in suburban Philadelphia. He can be reached at 215-362-5574 or at [pete@depauloresearch.com](mailto:pete@depauloresearch.com). Sharon Livingston is president of Executive Solutions, Inc., a Syosset, N.Y., marketing research firm. She can be reached at 516-992-5698 or at [sharonl@executive-solutions.com](mailto:sharonl@executive-solutions.com). Joel Raphael is president of ViewPower, Inc., a New York research consultancy. He can be reached at 212-581-8113 or at [jraphael@att.net](mailto:jraphael@att.net).*

**C**an productive focus groups be conducted remotely, that is, by teleconference or videoconferencing? Do we lose too much if the moderator is not physically present in

the traditional way, sitting face-to-face with respondents in the same room?

Conversely, might there actually be some research advantages to such arrangements? Or, is remote moderating merely an expedient for cutting the cost and risk of travel?

These issues are timely. In the current tight economic climate and the aftermath of September 11, moderators and their clients are particularly interested in options for conducting interviews remotely. Also, improvements in technology and the Internet are enhancing the quality and adaptability of videoconferencing, videostreaming to PCs and other forms of remote communication for focus group research.

To gain some insight into the qual-

ity of remote-moderating options, Executive Solutions, Inc., recently sponsored a qualitative experiment at its New York regional facility, The Looking Glass. What made this experiment unique was that the same group of respondents discussed the same general topic under three different modes of interaction: by telephone, remote video, and traditional face-to-face. The study was co-sponsored by FocusVision, Inc., which provided the remote video capability.

### The experiment

Actually, much of this exercise was rather typical for focus groups. The discussion subject was a local shopping center, the Walt Whitman Mall in Long Island. The respondents were six



# Reveal New Resources With Services from The Analytical Group

Sometimes you just don't have enough people, time or the expert resource required to bid or take on a project. By using The Analytical Group as your support staff, you can take on new clients, offer additional services and expertise, get into new markets and fulfill more of your current customers' needs. . . With over 30 years in the industry we do superior work and our affordability gives you greater profitability.

## **Telephone Interviewing Centers**

Our telephone interviewing centers excel in data collection and field management. Like our many software users, we use our WinQuery CATI software at our facilities. You can be confident we are using the most dependable software with the most advanced capabilities.

We are the WinQuery experts.

## **Data Processing Services**

From data entry and optical scanning to crosstab and custom programming, we provide all services through final presentation. We use our own powerful WinCross crosstab software. We are the WinCross developers and experts.

## **Statistical Consultation & Analysis Services**

Theoretical direction, strategic consulting or rigorous techniques, our analysts and consultants have a broad range of experience in academic theory and practical applications.

## **QueryWeb**

The Analytical Group offers you a complete QueryWeb Internet hosting service to help you get your studies on the Web with the least investment in time, effort, and costs. QueryWeb has all the advanced features you've come to expect in WinQuery.

Our attention to detail ensures that you get the most appropriate solution, quickly and cost-efficiently.



*The Analytical*  
Group Inc.

800.946.2767 • [www.acsinfo.com](http://www.acsinfo.com)



female patrons of Whitman and other local malls. The group included young adults as well as middle-aged women, and focus group veterans as well as novice (“virgin”) respondents. Specific questions included shopping habits, perceptions of the Whitman center, reasons for preferring one mall versus another, and suggestions for improving Whitman. Moderators were highly experienced practitioners who have been in the qualitative research profession for decades.

What was not typical was the division of the 90-minute discussion into three separate sets of questions, administered in different modalities and by different moderators.

1. Telephone focus group phase. After arriving, the participants were seated at separate telephone cubicles. They were asked to imagine that they were at home and were to dial into a conference call. The call was routed through the telecommunications equipment of Market Navigation, a research company that provides telephone focus group services. George Silverman, president of Market Navigation, conducted this phase of the focus group. While moderating, Silverman was able to watch his laptop computer screen, which identified the respondent talking at the moment. (This computer-screen ID is a component of Silverman’s system.) During this phase, he actually was in another room at The Looking Glass. Of course, he could have been anywhere in the world with telephone lines.

2. Remote video phase. After completing the telephone phase, the respondents were brought together into a room where they simultaneously watched a TV monitor showing the live “talking head” moderator, Sharon Livingston of Executive Solutions. Like Silverman, Livingston actually was in another location on the premises but could have been anywhere with suitable video equipment.

3. Traditional face-to-face. For this last half hour, respondents were brought into one of the Looking Glass’s focus group rooms and seated around the conference table for a traditional face-to-face discussion. Joel Raphael of ViewPower was the mod-

erator for this phase. After completing the discussion of the shopping mall, Raphael asked the respondents to share their feelings about the three modalities, including how comfortable they were with each way of participating.

Although each moderator asked a different set of questions, all three concentrated on the same subject — the shopping mall. The second and third moderators built on the prior discussions, just as the later questions in a typical qualitative interview relate to the earlier ones.

### Observers

In order to explore the reactions of research professionals to this experiment, Executive Solutions invited a number of observers — mostly other qualitative consultants from the mid-Atlantic region — to the back room. They watched all three moderators in action, and were also able to see participants in the video and face-to-face phases. Later, these on-site observers participated in debrief discussions with Silverman, Livingston, and Raphael, regarding what worked and the relative advantages of each modality.

In addition to observers in the real back room, there also were remote observers around the country. They were able to watch the proceedings thanks to an Internet broadcast arranged by FocusVision’s videoconferencing service. A number of these observers instant-messaged or called in questions during the proceedings and debriefs.

### Qualitative results

The big picture is that all three modalities worked well in stimulating respondents to share their thoughts and feelings. Respondents engaged in productive conversations throughout the three phases. The professional moderators who conducted the experiment came away confident that telephone and talking head focus groups can generate genuine qualitative insights in the same league as face-to-face groups.

• *Telephone results.* Observers, most of whom had never conducted a tele-

phone focus group, enjoyed the smoothness of the phone phase. Respondents opened up immediately after Silverman’s introduction, and verbally confirmed their high level of comfort with the telephone session when Raphael asked them about it at the end of the third phase. As Silverman pointed out, we should hardly be surprised at respondents’ ease right from the get-go, as people use telephones in all kinds of situations in their daily lives.

During the telephone session, respondents rarely talked over each other. They politely took turns, unlike the case with face-to-face respondents, who have to be reminded not to talk all at once. In fact, when the face-to-face session started, respondents almost immediately began talking in multiple simultaneous conversations until Raphael brought them under control. This was powerful evidence that a telephone focus group has the advantage of avoiding the frustrating, garbled recording you get when respondents talk simultaneously.

In audiotapes from traditional face-to-face groups, it is usually hard to tell who is talking, except for the respondents with the most distinctive voices. This is not a problem in Silverman’s methodology for telephone groups, because he asks them to mention their first names whenever they talk. Because the respondents do not know that Silverman is watching a screen identifying the talkers, they oblige. This request would seem strange in a face-to-face group, where respondents can see each other’s name tags. But in the telephone groups, giving their name when they talk identifies them to each other.

Livingston offered a motivational reason why it is good idea for respondents to identify themselves when they speak: by doing so, they take more responsibility for what they say.

Of course, telephone focus groups have a potential downside, although it is easy to overstate its importance: the moderator does not see the respondents. Researchers who have not conducted or heard telephone focus groups are understandably concerned about the loss of the visual cues such



as facial expressions.

Interestingly, there is evidence from academic studies in social psychology suggesting that in judging a person's sincerity, visual cues add little to what is evident from hearing the person talk. In fact, when the observers at The Looking Glass were listening to the telephone focus group during the experiment, they noticed that respondents' feelings were quite evident in their voices.

Neither our experiment nor the academic studies suggest that visual cues are useless in qualitative research. During a telephone group, the moderator cannot watch how other respondents are nonverbally reacting to the respondent who is talking. Nevertheless, it seems clear to us that telephone focus groups are an underutilized and under-appreciated methodology.

For Silverman and others who have conducted telephone focus groups, these findings were no surprise. We emphasize them here because the advantages and quality of telephone

focus groups still are not widely known. Perhaps this lack of awareness explains why Internet focus groups are typically compared only with traditional face-to-face groups, rather than also with telephone groups.

• *Talking-head results.* In this phase, Livingston, the moderator, did have access to each respondent's visual cues (and likewise, respondents could see her), through a video monitor.

As they began the session, respondents continued to engage in the productive conversation that started in the telephone phase. When they later reflected on their "talking head" experience in the debrief, they admitted to feeling a little strange at the start of the remote video session — presumably because they aren't used to interacting with a person on a TV set. However, the respondents quickly got used to this, as was evident to observers watching the respondents on closed-circuit TV. They also paid close attention to the monitor, watching the "show host" with focused interest.

One of the advantages of the talk-

ing-head setup is the ability to observe respondents' body language. Although Livingston was "remote," she was able to observe and zoom in on individuals' facial expressions and other non-verbal behavior — which would not be observable, of course, on the telephone. She was able to call on a particular respondent when body language silently signaled that the person might have something to say. When one shifted in her chair as another was talking, Livingston called on her next to check her response to the comment just made. This reading of the non-verbals flowed as naturally as it would in a conventional in-person setting. In fact, the remote camera seemed to make reading the group more efficient for the moderator, since participants were not able to tell exactly who Livingston was looking at moment to moment. This scanning of the group for non-verbals would have to be done more discreetly in-person.

There were some other fascinating elements unique to the video conferencing setup that appeared to make

We know how to say  
**Hello**  
in 61 Languages!



## The Leader in Multicultural Research



INTERVIEWING SERVICE of AMERICA

- Asian-American Specialist
- 325 CATI Phone Stations
- Entho-Specific Sample
- Internet/IVR Interviewing
- Culturally Sensitive Translations
- Qualitative Research
- Complete Data Processing

For Expert Multicultural Research  
Call the ISA Office Nearest You

Los Angeles - Corp.  
(818) 989-1044

Washington D.C.  
(410) 827-4855

New York  
(212) 473-0718

Chicago  
(312) 335-9004

Web Site: [www.isacorp.com](http://www.isacorp.com)



eliciting information potentially even more effective than a conventional setup.

• Video leadership is more intriguing and exciting to the group members. Seeing the moderator on TV may impart an almost celebrity status to the facilitator as it does to a newscaster or host on a regular TV show. This effect seemed to contribute to heightened interest and energetic participation during the group session. The effect of the TV was confirmed when

Livingston later met the respondents in person, and they behaved in an almost starstruck manner. Suddenly you're no longer a Regular Joe (or Joanne), but are someone special, it appears.

• People enjoyed the unique experience of talking to the television and having it talk back. The interactivity factor made the sessions more stimulating for participants. As was the case in the telephone group, respondents mostly took turns relating to the TV host and each other, rather than engaging in simultaneous conversations.


moderator.

So, what's the bottom line on remote moderating? Both telephone and TV work and work well. In some cases they may work even better than conventional groups — and they have the potential to save clients money.

### What can we conclude?

Our qualitative experiment was, of course, not conclusive in the quantitative sense. It was not a scientifically controlled experiment with repeated measures in counterbalanced sequences of modalities, nor was it intended to be. Nevertheless, for the observers and moderators, it was compelling. This is analogous to clients sometimes coming away from a focus group with the intuitive confidence to make a marketing decision even though they know full well that qualitative results are not projectable statistically. Likewise, the moderators who observed the process came away with the firm impression that remote moderating by telephone and remote video really works. They now are eager to do remote interviewing themselves.

We believe that remote moderating should be undertaken with the positive attitude that the client can gain a great deal of rich insights. It is time to move beyond the presumption that any focus group without the moderator physically present in the same room with respondents is merely a weak, "better than nothing" substitute to be used only when absolutely necessary. Indeed, when it is important to hear the full range of views of the target market, at least some of the groups should be by telephone in order to hear from the type of respondents who cannot or will not come to a focus group facility.

Similarly, remote video moderating should be viewed positively as a means to make the best use of moderators' time, enabling them to do more groups and less traveling. If, for example, a small group of highly valued respondents (e.g., experts or executives) is an ocean away, remote video monitoring can allow clients to "see" this crucial market segment talking about the product without the delays, costs, and risks of world travel by the moderator. 

## Development II, inc.

Business Consulting & Market Research

A relationship is a close partnership that continually evolves through mutual cooperation, common goals, and respect.

Full Service Market Research

### Development II, inc.

107 Middle Quarter

P.O. Box 992

Woodbury, CT 06798

888-227-3244 fax 203-266-4697

Email: [info@development2.com](mailto:info@development2.com)

[www.development2.com](http://www.development2.com)

### Enhance communication

In her questioning, the moderator applied a few projective techniques. The guided imagery worked effectively, as it does in a conventional focus group, with responses that were full and rich. Thus, our experiment suggests that remote moderation allows the leader to draw out psychologically-motivated material in addition to responses to direct questioning.

Remote moderating can also enhance communication with the back room, which no longer needs to be situated in the dark behind a two-way mirror. If desired, client observers can be in the same room with the moderator, just out of camera or telephone range, and thus more conveniently and effectively communicate with the

## THE RESEARCH SPECTRUM

A Full-Service Marketing Research Organization

With our full range of capabilities, we're positioned to offer you complete research design, project management, data collection, tabulation and analytical services in-house.

Continued growth over the past 19 years is due in great part to the continued loyalty of our clients—over 90% of our work is repeat business. Find out for yourself how the quality of our work keeps our clients coming back.

Call Rick Snyder at 415/701-9979, or email him at: [rhs@researchspectrum.com](mailto:rhs@researchspectrum.com)

- Centrally-supervised WATS telephone interviewing, with CIMC or C3 CATI.
- Online, Internet and Email surveys.
- Mail/Disk By-Mail Surveys.
- International and Foreign Language Interviewing.
- Central Location Testing.
- Mall and Trade Show Intercepts.



THE RESEARCH SPECTRUM

2245 Market Street • San Francisco CA 94114 • [www.researchspectrum.com](http://www.researchspectrum.com)



# PAMPER YOUR CLIENTS



## CONSUMER SURVEYS COMPANY IN CHICAGO, WHEN YOU DEMAND EXCELLENCE

- Communicate instantly with your moderator from the viewing room by means of a *unique computer system* visible only to your moderator.
- Use a *remote control video taping system* located in the rear of the room... not in front, blocking your view.
- View the group in our *client lounge* or in our *tiered observation room* that *comfortably seats fifteen* of your agency and corporate traveling companions.
- Watch your group through a *sound insulated window*.
- Feel refreshed by our *separate air/heating system*.

IF IT'S WORTH DOING, IT'S WORTH DOING WELL



Consumer Surveys Company

Northpoint Shopping Center • 304 E. Rand Rd. • Arlington Heights, IL 60004  
Tel: 847/394-9411 • Fax: 847/394-0001  
[consumersurveys1@aol.com](mailto:consumersurveys1@aol.com)



## Research Industry News

continued from p. 14

products. Nielsen//NetRatings and DoubleClick will also collaborate on the development of reach and frequency campaign planning tools.

Separately, NetRatings has acquired **ACNielsen eRatings.com** for \$9.6 million in stock. The transaction allows NetRatings and eRatings to fully integrate their businesses, combining operations and consolidating their services under a global brand. ACNielsen eRatings.com, an Internet audience measurement company with operations outside the United States, is a joint venture 80.1 percent owned by ACNielsen and 19.9 percent owned by NetRatings. The companies jointly produce the Nielsen//NetRatings service which tracks audiences, advertising and user activity on the Internet globally.

Under the terms of the deal, NetRatings has acquired the 80.1 percent of ACNielsen eRatings.com that it does not already own for 749,341 shares of NetRatings stock, worth \$9.6 million. VNU continues to own, through ACNielsen and Nielsen Media Research, a majority of the NetRatings shares outstanding and its designees continue to comprise a majority of the NetRatings' directors.

Paris-based **Ipsos** has signed a letter of intent to acquire **Sample-INRA Group**, a German research firm.

### Alliances/strategic partnerships

**ACNielsen Media International** has acquired the right to use Radiocontrol, a measuring technology developed by GfK subsidiary **Telecontrol**, for radio ratings in 19 countries in the Asia-Pacific region.

Radiocontrol is an electronic meter, incorporated into a wristwatch, that measures radio and TV consumption. The system records all sound in the wearer's environment on a minute-by-minute basis. Since January 2001, Radiocontrol has been commissioned by the Swiss radio and TV company SRG SSR idée suisse for use in offi-

cial radio ratings in Switzerland. The technology is currently being tested in other European countries, including Germany, France, the U.K., and Norway.

**Arbitron Inc.**, New York, and **comScore Networks, Inc.**, Reston, Va., have announced a collaborative effort to develop Internet measurement services for local media. Arbitron will meet with management of local media outlets, including radio, TV, cable, newspapers, Internet content providers and advertising agencies, to enlist support for these jointly-developed metrics.

**Taylor Nelson Sofres** has formed a joint venture with Greek information and consulting services company **ICAP A.E.** The joint venture company, to be known as TNS ICAP A.E., will provide market information to clients in sectors including consumer, telecom, automotive, banking and finance. Taylor Nelson Sofres will enter into a licensing agreement with the joint venture, allowing TNS ICAP to use the group's Branded Solutions in the Greek market. TNS ICAP will have 22 full-time employees and its main office will be in Athens. Taylor Nelson Sofres will have a 51 percent holding in the new company, with the balance being controlled by ICAP, which is putting its research division into the joint venture. The managing director of the joint venture will be Helena Chari, who currently heads ICAP's market research division. In 2001, the division had revenues of approximately EUR 1.3 million.

Port Washington, N.Y., market information provider **NPD INTELECT** and the **Global Technology Distribution Council (GTDC)** have launched a new service, through INTELECT's NPDTechworld unit, which provides market information for the IT and consumer electronics industries. Under the agreement, NPDTechworld and the GTDC will launch an industry-wide initiative to aggregate and publish sales data from the GTDC's North American distributor members. In 2001, IT product

and service sales from GTDC members were between \$90-100 billion, representing approximately 70-80 percent of total domestic IT sales.

Wilton, Conn.-based **Greenfield Online, Inc.** has added **Research Data Design, Inc.** and **Directions Research, Inc.** to its partner program.

**Campos Research and Analysis**, Centennial, Colo., has become a certified QualPartner with **QualTalk**, a Castle Rock, Colo., online research firm. Campos Research and Analysis now offers its own branded version of online bulletin board qualitative research.

### Association/organization news

*(also see this month's News Spotlight)*

**The European Society for Opinion and Marketing Research (ESOMAR)** has initiated a research project, **Marco Polo**, aimed at gathering information on the needs of market researchers in client companies, now and in the future. The focus of the effort is on improving the understanding of ways in which marketing research providers and clients can work together to maximize the impact of marketing research.

The Marco Polo project is set-up in three phases. Worldwide in-depth interviews among large providers and clients were held during March and April. Preparations have started for conducting a global Web-based survey. The objective in this second stage is to obtain quantitative assessments and to test ideas on cooperation and future directions. Full results will be presented during the ESOMAR Congress in Barcelona on September 22-25.

After September a third phase will be carried out, involving building scenarios and outlining their implications. Emphasis will be on developing actionable plans for better cooperation, enabling providers to help improve the clients' research function.

During the RELEAS Research Leadership Summit process, orga-



nized by the Advertising Research Foundation and ESOMAR, industry leaders discussed ways to strengthen cooperation between clients and providers in the industry. While quite a lot is known about the supply side of the industry, up-to-date insights on the client side are lacking. So they agreed to put especially strong focus on initiatives to strengthen the role of market researchers within client companies.

The need for closer cooperation between clients and providers in the research industry is prompted by significant changes in demand. Companies require different services from market research firms than before. New types of demand arise from developments such as globalization and tougher competition. New technologies and the availability of new data collecting mechanisms, among other things, also multiply the need for change. Researchers working on the client side are in the best position to share insight on the type of business infor-

mation that companies need.

### Awards

The Indiana Information Technology Association (INITA) named **Walker Information**, an Indianapolis research firm, as a finalist in the Services Provider category of the 2002 CyberStar Awards contest. The awards recognize firms that provide assistance for information technology companies to achieve success. Walker Information shared the finalist honor with Professional Staff Management, while the selection committee selected Grow Indiana Media Ventures as the winner.

### New accounts/projects

**CCS Online**, a Fairfield, Conn., business software development company, has announced an agreement with **Nielsen Media Research** to license CCS's ResearchExec product for all of the company's Internet research in the future. ResearchExec allows users to manage, produce and analyze a range of Internet-based

research projects and campaigns, including customer satisfaction, employee surveys, business market studies, field research, clinical trials, and packaging testing, among others.

### New companies/new locations

**Millward Brown Spain** and **Iberautor** have created a new company, CIMEC Millward Brown, offering research and consultancy services to Spanish clients in the entertainment, leisure, and culture businesses. The new company will have a staff of four and be based at Millward Brown Spain's offices at Alcalá 474, Madrid.

A new research firm, **Inner Bilbao**, has opened in Bilbao, Spain. The facility includes qualitative studio facilities with client viewing room, simultaneous translation, and video-conferencing equipment. For more information contact Jesús Cámara at 34-94-435-5025 or at [jcamara@inner.es](mailto:jcamara@inner.es).

Chicago-based **Research**



# ascribe

by language logic

- ☒ Online verbatim management tools in a collaborative ASP environment
- ☒ Outsourced software & coding services

*Unleash the power of ALL your data*

Language Logic  
513.241.9112  
[www.languagelogic.net](http://www.languagelogic.net)  
[sales@languagelogic.net](mailto:sales@languagelogic.net)



SPSS MR  
513.552.8700  
[www.spssmronline.com](http://www.spssmronline.com)  
[sales@spssmr.com](mailto:sales@spssmr.com)



**International, USA**, has closed its Miami office and moved its New York City office to Stamford, Conn. The Miami office of Research International was the smallest in the domestic network, with five full-time staff members. All clients of this office have been reassigned to other offices. Mark Willard, executive vice president of the NYC office, will retain his leadership position as head of the Stamford office. All NYC office

staff are expected to move to the Stamford office. The address/telephone of the new Stamford office is Research International, 3 Landmark Square, Stamford, Conn., 06901. Phone 203-358-0900. Fax 203-353-0883.

### Company earnings reports

In the first three months of 2002, Germany-based **GfK Group** increased its sales by 19.8 percent from EUR 107.6 to 128.9 million. EBIT including income from participations rose by EUR 2.4 million to EUR 5.6 million. The return on sales rose from 3 to around 4.3 percent. The GfK Group is publishing its quarterly figures under the United States Generally Accepted Accounting Principles (U.S. GAAP) for the first time in 2002. The financial statements are therefore only comparable to a limited extent with the figures published for the corresponding period in the previous year, which were prepared in accordance with the provisions of the German Commercial Code (HGB).

The Consumer Tracking division maintained its sales compared with the same quarter in the previous year and reduced its loss. In the Non-Food Tracking division sales rose by almost 9 percent. Around 50 percent of this is accounted for by companies that were not included in the scope of consolidation in 2001. There was an overproportional rise in operating income to EUR 3.1 million compared with sales. The conversion to U.S. GAAP only had a minor impact.

In the Media division both sales and operating income had double-digit growth. The increase is based on two factors: on the sales and income contributions of GfK subsidiary Intomart Benelux, Netherlands, in the first quarter of 2001, which was not consolidated under U.S. GAAP and the companies Telecontrol Group, Switzerland, and Metris, Portugal, which were consolidated for the first time on July 1, 2001.

Sales by the Ad Hoc Research division exceeded expectations and operating income was more or less on tar-

get. The sharp increase in sales to EUR 55.6 million and operating income to EUR 1.4 million is essentially due to the newly consolidated companies GfK Macon, Germany, and Martin Hamblin GfK, United Kingdom.

Milpitas, Calif.-based **NetRatings, Inc.** announced a reduction in its previously announced first quarter loss due to acquisition-related subsequent events. A discussion of these subsequent events, as well as the company's complete financial results for the quarter, are presented in the company's Form 10Q.

On October 25th, 2001, the company had proposed acquisitions of eRatings and Jupiter Media Metrix. These transactions were subsequently terminated during the first quarter. On May 7th, 2002, NetRatings completed and announced acquisitions of eRatings and the European audience measurement contracts of Jupiter Media Metrix subsequent to the reporting of financial results for the first quarter. Consequently, \$2.2 million of the acquisition costs, previously disclosed in the company's financial tables as expenses, have now been capitalized because of the relationship between the recent acquisitions and the terminated transactions.

Additionally, in connection with the eRatings acquisition, NetRatings will now be utilizing a portion of the leased space previously included as restructuring expenses. The co-location of eRatings with NetRatings will enable the company to service its clients under a common brand, with a unified team and shared infrastructure. The restructuring expense is now reduced by \$876,000 to \$7.0 million.

The combined effect of the capitalization of acquisition-related expenses and the reduced restructuring expenses resulted in a GAAP net loss of \$14.6 million, or a net loss per share of (\$0.45), which is an improvement from the GAAP net loss of \$17.7 million, or a net loss per share of (\$0.54) previously reported on April 30th.



## Too much open-end data from your last Internet or CATI study?

### ADAPT Can Help!

**ADAPT has designed a proprietary on-line coding system specifically for Internet and CATI produced comments.**

**This state-of-the-art system works at twice the speed of traditional coding methods. By coupling this speed with our 20 experienced professional coders, we can get you the data you need fast.**

#### Our service offering:

- 1) Survey Printing and mail distribution
- 2) Returns management for follow-up mailings to non-responders
- 3) Return Mail Handling
- 4) Survey check-in and editing
- 5) Comment coding and verbatim transcription
- 6) Data Entry
- 7) State-of-the-art Character Recognition Scanning
- 8) Tabulation
- 9) Audio tape transcription

**Get your survey processed by Market Research Professionals.**

**Contact: Dave Koch**

**1-888-52ADAPT**

**dkoch@adaptdata.com**  
**ADAPT Inc.**

**5610 Rowland Road, Suite 160**  
**Minnetonka, MN 55343**



# 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.



"Purchase-intention surveys can take you only so far, marketers would also do well to observe consumers in real buying situations."

**Harvard Business Review**

Sorensen Associates **the in-store research company™**

**30 years of in-store research**

Portland, Oregon: 800.542.4321 • Minneapolis, Minnesota: 888.616.0123

[www.sorensen-associates.com](http://www.sorensen-associates.com)



## Software Review

continued from p. 18

Throw in the whole lot, and Ascribe will automatically discard any duplicates, and only add in what has changed — though you can fool it if you are inconsistent with your interview numbers from one batch to the next.

### Tame your open-ends

Once your data are ready for coding, you can use seemingly dozens of different ways to tame your open-ends. All start with the same assumption that the best coding tool is the human mind. This is no auto-coding system: The tools exist to support and empower the coder to take better coding decisions.

This flexibility means you can replicate traditional coding methods or explore new ways to work by giving the coder more discretion and allow him or her to evolve the list of coded answers during the coding process. For

example, you can text-search then group items together using drag-and-drop, nominating one answer to give the group its identity and its text. You can then create more groups or use drag-and-drop to assign more individual answers to this group, and so on, until all of the answers are classified. It is as simple as that.

Although you are using no more than a Web browser, it is remarkable the extent to which drag-and-drop and right mouse clicks have been made to work, thanks to the Java application behind it all. The context-sensitive right-click menus are especially handy while learning Ascribe, when you reach one of those “What do I do now?” moments. The user interface is particularly well designed to be highly productive in use: There is almost no typing involved and the mouse button menus mean that most operations are achieved in one, two, or three mouse clicks. All of these precious seconds saved add up over the life of each project to massive

time savings. The few places in the interface where the process or the terms used are counterintuitive are therefore more noticeable. But they are likely to be short-lived, as Language Logic has a reputation among its users for fixing things quickly.

The service is offered on an ASP (application service provider) basis, so once you have opened an account with Language Logic, you can start coding from your Web browser. Pricing is calculated on the volume of work you do, not on any software license or monthly rental costs.

### Any location

Web deployment also means that you can work from any location. Ascribe was originally devised as a means to allow for coders to work from home, recognizing that the Internet can be a liberator for the many workers that must juggle work and home responsibilities daily. Equally, location-independent coding means that projects can be monitored and supervised from afar — and the unreformed workaholics, by visiting an Internet café, can even check on their projects while supposedly vacationing.

The system recognizes these different types of user. The administrator password allows you to set up usernames and passwords for other workers on your account and grant different privileges to coders, supervisors, research directors, and even clients. Allowing clients to observe or even participate in the coding process may be controversial for some agencies, but is likely to be very appealing for clients.

Making the information available, so that coding decisions can be monitored, improved and even reversed, is a strong point of Ascribe. It even provides a tutoring mode, so that a new coder can code the same data as someone more experienced; the system will then highlight the differences as an aid to learning.

### Entire spectrum

Ascribe seems to work equally well

# More is more

We have eleven mall offices (including our newest at Capitol Mall in Olympia, Washington) which means you have a wide range of choices for data collection. You can choose from the midwest in Chicago to the west coast in Seattle, Portland, or San Jose with mountain state offices Boise, Salt Lake City, and Spokane in between.

So while we understand the expression “Less is more”, when it comes to data collection...more is more.

Call us with your next data collection assignment.



**Consumer Opinion Services**  
*We answer to you*

12825 1st Avenue South Seattle, WA 98168 [www.cosvc.com](http://www.cosvc.com) 206-241-6050

Seattle ♦ Spokane ♦ Boise ♦ Portland ♦ Salt Lake City ♦ San Jose ♦ Chicago



across the entire spectrum of survey research, from large agencies like ACNielsen BASES, which is using Ascribe to code 1.5 million verbatims a year, to in-house research units with just a handful of projects to administer.

Mark Thatcher, vice president at ACNielsen BASES, considers Ascribe's greatest benefit to be the low level of technical expertise required to work with the data. "Coding is a non-technical, manual process," he observes. "In the past, before we could realize any efficiencies we had to increase the skill set of the end user. This need for training usually brought with it some initial costs and downtime that we would just as soon have avoided. Ascribe enables anyone with a basic familiarity with an Internet browser to use this tool and have power over the data."

Used at ACNielsen BASES to code Web survey responses, the tool is increasingly being utilized in a collaborative way to develop code lists for international studies. Ascribe is truly multi-lingual and, with double-byte support, supports all the non-Roman alphabets like Arabic, Hindi, and Japanese.

The move to using Ascribe has, in Thatcher's opinion, added status and value to the role of the coder within the organization. "The coders feel more empowered and more respected by both internal and external clients. And the coders love it. In some cases, they have claimed productivity increases of up to 200 percent."

Such large-scale use puts any system to the test, and Thatcher has encountered some problems relating pre-coded and verbatim responses on the same question. It has proven a nasty problem to solve, and the solution offered is, in Thatcher's opinion, only "satisfactory."

Another problem users report is in communication between users when several people are working on the same project. It is not easy to see what codes other people have defined or applied; some functionality to high-

light these, or allow users to communicate would help.

Amy Hatton uses Ascribe virtually single-handed in her role as marketing research manager at information services provider and publishing firm LexisNexis in Dayton, Ohio. Among other information sources, LexisNexis provides online legal research services to legal firms and registered law school students.

Colleagues often had to give up on coding the open-ended responses from surveys and other internal and external projects, due to pressures of time. Rather than ignore this valuable information, Hatton selected Ascribe to help her complete the task in less time. "It is a great tool, because it is more efficient than the alternative, which is to do it by hand," she says. "In research, coding has got to be one of the most unfulfilling and tedious jobs, and this tool actually makes it interesting, or as interesting as it can be! You can go back to change or recode things, so it is very flexible."


Typically, Hatton can take care of a project with around 5,000 open-ended responses in a day, compared to around a week to do the task manually.

Ascribe also contains a versatile tab tool which allows you to crosstab any of the closed data you have imported as well as any coded questions. For each cell, it will give you a count of the verbatim responses from where you can drill down and see the original responses. It is another powerful facility, and something few tab packages can offer.

Hatton has found that, by importing all of her pre-coded questions and demographics into Ascribe, this crosstab tool is adequate for all her analysis on simple studies. When more is required, she exports the coded data to SPSS. Her only grumble is with the data importation process, which can be time-consuming, taking up to two hours on some projects. For more typical uses, imports do not take anywhere near that long, as they do not import all of the data, only the rel-

evant fields.

### Better results, less time

Ascribe is a shining example of technology and the Internet working at their best to get better results in less time and at less cost, while freeing us from the old constraints of location. In the office, at home or even in the office at home, it is all the same. And unlike a dishwasher, you can actually see exactly what is going on inside. 



### When it comes to usability, Fleischman does it best.

Two labs with picture-in-picture video, high-speed internet lines and qualified respondents for testing.

And of course, as always – *Qualitative and Quantitative capabilities in 8 languages.*

For more information, visit our website at:

[www.ffrsf.com](http://www.ffrsf.com)



FLEISCHMAN  
FIELD RESEARCH

800.277.3200

San Francisco • Walnut Creek

[www.ffrsf.com](http://www.ffrsf.com)



## Survey Monitor

continued from p. 8

Wal-Mart Supercenter sales growth came from new shoppers and 21 percent came from existing shoppers who increased their Wal-Mart Supercenter spending, the majority — 72 percent — came from a direct shift of dollars that had previously gone to other channels. As the chart shows, almost one-third of that

last fall. Those online from any location are up from 64 percent to 66 percent; those online from home are up from 52 percent to 55 percent; those online at work are up from 28 percent to 30 percent, and those online at another location are unchanged at 19 percent.

These are the results of a nationwide Harris Interactive survey conducted by telephone with a sample of 2,038 adults in February and March.

between February 13 and 19, 2002 among a nationwide cross-section of 1,021 adults and a similar survey of 1,017 adults interviewed between March 13 and 19, 2002. Figures for age, sex, race, education, number of adults, and number of voice/telephone lines in the household were weighted where necessary to align them with their actual proportions in the population. For access to the data tables for this survey visit [www.harrisinteractive.com/harris\\_poll/index.asp?PID=295](http://www.harrisinteractive.com/harris_poll/index.asp?PID=295).

## Seven in 10 mothers use PCs

Just over 70 percent of the nation's mothers age 21 and over use computers in 2002, up significantly from 57 percent in 2000 and 35 percent in 1994, according to preliminary results from the 2002 Technology User Profile report released by MetaFacts, an Encinitas, Calif., research firm.

Access to the Internet is one reason for the big increase in computer use by mothers, as nearly eight in 10 American mothers with PCs access the Internet. "Gaining access to the Internet and e-mail has played a major role in convincing mothers to buy and use home PCs," says Dan Ness, MetaFacts principal analyst. "Although many different types of Internet appliances have been available for years, these haven't been as widely adopted as personal computers."

The personal computer is a focal point for other technology products in the household. Nearly one-third (31 percent) of PC-using moms have a digital camera and 18 percent have a PDA. "The age of children in the household was not a factor in whether moms were more or less likely to have a PC," says Ness. "Households with toddlers have the same PC penetration rate as those with pre-teens and teens."

Cellular phones are another technology product favored by moms. More than eight in 10 (82 percent) of moms with PCs have a cellular

Source of 2001 Wal-Mart Supercenter "Channel-Shift" Revenue Growth	Percentage of 2001 Wal-Mart Supercenter "Channel-Shift" Revenue Growth
All Other Channels	33
Grocery Stores	32
Wal-Mart Division 1 Stores	22
Other Mass Merchandisers	13

Source: ACNielsen Wal-Mart Channel Service 52 weeks ending 12/29/01

"channel-shift" revenue growth came from the grocery channel.

Hale says it is important to note that the degree to which Wal-Mart is gaining at the expense of the grocery channel is actually somewhat less than would be expected. "When you exclude the supercenter channel, grocery stores generated 40 percent of all-outlet revenue in 2001. Therefore, of the channel-shift revenue growth experienced by supercenters, we would expect 40 percent to come from the grocery channel. The fact that it was 32 percent means grocers are having at least some measure of success defending their turf."

## Internet penetration increases

According to data from Harris Interactive, Rochester, N.Y., fully two-thirds (66 percent) of all adults are now online. This includes more than half (55 percent) of all adults who access the Internet from home, almost a third (30 percent) who access it from work, and almost one in five adults who go online from a school, library, cyber cafe or other location. Of course, some people are online from two or more places.

These numbers show a modest increase in Internet penetration since

The 66 percent of adults now online comprise 137 million, up from 127 million last fall.

This new growth in the Internet population comes after a six-month period, from spring 2001 until fall 2001, when there was no growth. Presumably this pause in online growth was the result of a slowing economy and the loss of some of the magic of the Internet following the collapse of the dot-com investment bubble.

The profile of Internet users still has a bias towards the more affluent, better-educated consumers, but the profile by age is looking more like a cross-section of all adults — up to, but not including, those over 65, who comprise 16 percent of all adults but only 5 percent of those online.

One other interesting finding in this research is that there has been little change in the amount of time Internet users spend online. On every occasion Harris has measured it, respondents have been spending seven or eight hours online each week. A reasonable assumption however is that as technology and Internet skills have improved, people can get more done now in the seven or eight hours they spend online than they could have a few years ago.

The Harris Poll was conducted by telephone within the United States



phone, compared with only half of moms without PCs.

Of the mothers who do not own a computer at home, the main stated roadblocks to purchasing one were a lack of experience in buying consumer electronics, perceived high risk in buying electronic products, not feeling they can keep up with current events, and financial concerns. "Waiting for prices to come down and concerns about Internet security and privacy received similar importance ratings from PC-using moms and moms that don't use PCs," says Ness.

Socioeconomic factors are some of the most distinguishing characteristics separating PC-using moms from those that don't use PCs. Moms with PCs are educated (at least some college), work outside the home, and work in a professional, managerial, technical or administrative occupation. Also, their spouses have a similar educational and occupational profile. Household incomes are also a defining factor, with incomes \$35,000 and over being above average in their PC use by moms.

Other findings from the report include:

- A greater percentage of moms in suburban areas use PCs than in central cities.

- The three states with the highest percentage of moms using PCs are Vermont (94 percent), South Dakota (89 percent), and New Hampshire (85 percent).

The data mentioned above are from preliminary results from the 2002 Annual Edition, as well as the published 2000 Annual and 1995 Annual editions of the Technology User Profile. The 2002 Annual Edition preliminary results are based on responses from 28,357 households drawn to be representative of all American households, of which 8,647 had a mother age 21 or older with children 18 and under in the home. Statistics from sample surveys are subject to sampling and nonsampling error. For more information

contact Dan Ness at 760-635-4306 or visit [www.metafacts.com](http://www.metafacts.com).

## Sales of digital cameras, camcorders heat up

With graduations, weddings and the summer holiday approaching, digital cameras and digital camcorders experienced a boost in sales in the first three months of 2002, according to NPDTechworld. In the channels that NPDTechworld tracks, combined unit sales of both categories experienced a 24.5 percent increase during the first three months of 2002 when compared with the first three months of 2001.

For the first three months of 2002, 1.229 million digital cameras were sold, compared with 958,000 during the same period in 2001 and 578,000 in 2000. For the same period, digital camcorders sold 215,000 units in 2002, 202,000 units in 2001 and 129,000 units in 2000.

"Digital cameras and digital camcorders are selling because they represent high quality in an easy-to-use product," says Tom Edwards, senior analyst, NPDTechworld. "Sales are up because the price points have come down considerably and many consumers are finding the technology too hard to pass up. Ten million digital cameras and camcorders will be sold this year, a 20 percent increase over the prior year."

The average selling price for digital camcorders decreased from \$803 in March 2001 to \$710 in March of 2002. The average selling price for digital cameras decreased from \$425 in March 2001 to \$385 in March of 2002.

In addition to sales price, another factor causing a boost in sales is the ease in which these digital products tie in with other products in the home including televisions and PCs.

Sales of digital media that allow consumers to tie their picture-taking together with their other electronic devices are also skyrocketing. In the first quarter of 2002 NPDTechworld

tracked the sales of almost 1.5 million memory cards, an increase of more than 150 percent over the first quarter in 2001. For more information visit [www.npdtechworld.com](http://www.npdtechworld.com).

## Simultaneous TV/Net use on the rise

New findings from MultiMedia Mentor, a media planning service from Knowledge Networks/SRI, suggest that television/Internet convergence is gaining acceptance among average Web users. During early weekday evenings, for example, simultaneous TV/Internet use among consumers age 35 to 49 has nearly doubled over the past six months.

As part of MultiMedia Mentor, Knowledge Networks/SRI conducts year-round studies of consumers' use of five major media — TV, radio, the Internet, magazines, and newspapers. The latest KN/SRI research shows that, compared to six months earlier, convergent TV/Internet use between 6 p.m. and 9 p.m. on weekdays nearly doubled among adults 35 to 49, with 11 percent reporting simultaneous use yesterday — a figure that had held at 6 percent for the previous two surveys.

Similarly, among men 18 to 34, simultaneous TV/Web use during the same hours rose 3 percentage points, to 13 percent, after remaining at 10 percent for the past two studies. For women of the same age group, the figure is 8 percent — unchanged for the past year.

Among teens (ages 12 to 17), TV/Internet convergence also grew, but more slowly than in the past; 13 percent reported simultaneous use from 6 p.m. and 9 p.m. during the work week, versus 11 percent six months earlier and 6 percent one year earlier.

MultiMedia Mentor data are based on in-depth interviews with about 5,000 consumers annually, with interviewing conducted 48 weeks per year. For more information contact Ericka Witnauer at 908-654-4000, ext. 155, or visit [www.knowledgenetworks.com](http://www.knowledgenetworks.com).



# Fidelity

continued from p. 21

approach. It should be emphasized that the survey population — people who had accessed the NetBenefits site in the previous 90 days — was a group that had demonstrated a preference for managing information online. There was some concern that those willing to provide information over the telephone would not be representative of the total population. Offering a choice to survey contacts seemed to be the best way to expand the response base by capturing those with both phone and online response preferences.

## In the field

Working with Burke Customer Satisfaction Associates to implement the survey, Fidelity fielded the benchmark study of more than 1,700 customers in April and May 2001. Potential respondents were told that the survey would take about 15 minutes, then — in the first 30 seconds of the interview — they were given the choice of completing the questionnaire by phone or on the Web. (People also were given the option of scheduling a phone survey at some other time.)

About 88 percent indicated they would take the study online. There are likely many reasons people voiced a preference for the online option. Some of these were no doubt polite refusals — customers who had no intention of completing the study at all.

Others, however, surely recognized that responding to the survey online would put them in control. The fact is that an evening phone call for survey participation is disruptive. Precious “home time” is often fully allocated to personal and family needs. Should a crying baby need attention during a telephone interview, respondents are not be able to put the phone call aside, then resume it later. With online participation, respondents can begin at times that are convenient for them

and handle such interruptions.

## Following through

We were, in fact, surprised by how many of those who indicated they would take the survey online actually followed through. These people were first asked to provide an e-mail address. Only 6 percent refused to do so. (Those who refused to provide an e-mail address were still given the option of participating in the study: They were given a survey Web site address, as well as a personal password. This effort elicited little response, however, as only seven completed surveys were obtained over the Web from respondents who did not provide e-mail addresses.)

People who chose the Web option and did provide an e-mail address were also given the option of writing down the survey URL and password during the phone call. They were also sent an e-mail invitation containing the same Web address and password. Slightly more than 10 percent of e-mail addresses provided turned out to be bad or recorded incorrectly. On the other hand, 54 percent of respondents who provided a good e-mail address did go to the site and complete the survey.

Although Fidelity was compelled to make initial calls because of a lack of e-mail addresses, it is unlikely that such a completion rate could have been achieved with e-mail invitations alone. We are fairly certain that the initial call introducing the study and its purpose and offering a sponsor contact number helped substantially. Absent the set-up call, online response would likely have been much lower.

## A time lag

The fact that there was a time lag between the initial promise to complete the survey online and ultimate disposition of the sample record did introduce an annoying uncertainty into the process. While the fielding was taking place, it was unknown how many promises would ultimately translate into completes. This situation made it unclear if enough respondents were being recruited to meet the

desired quotas. Although we turned out to have a higher than expected promise-to-completion ratio, this might not have been the case.

Because those who choose to participate do so on their own schedule, the results can trickle in. Less than 40 percent of people completing the survey on the Web did so by the end of the day after they were called. We attempted to impart a sense of urgency and sent a reminder e-mail to those who had not responded within five days. As it turned out, only 8 percent of Web responses were received more than seven days following the initial calls. (For the second wave of the study, a program was set up so that e-mail invitations were sent out immediately upon conclusion of the recruiting phone calls, leading to a somewhat faster response.)

## Disarming skepticism

When respondents were given a choice of methods, the total number of completions coming via the Web turned out to be more than three times as many as the completions coming via the phone. Because a secondary objective of the benchmark study had been to determine how phone and Web responses compared to each other, Fidelity actually had to do phone interviews without giving people a choice of methods simply to meet the initial phone quota expectation. (In the second wave of the study conducted this year, all potential respondents have been given a choice of survey methods.)

While data about survey completions tell part of the story, it is harder to convey the impressions created by monitoring the actual survey calls. Several calls seemed doomed to result in refusals, terminations — or worse, complaints to Fidelity. After interviewers introduced themselves, the customers on the phone were curt, distracted, and non-responsive. It was stunning to hear how their skepticism was disarmed once they were told they would have an option of channels for response. Informing respondents of their choice as early as possible in the interview was clearly a



# DialogPRO Advertising

## A single, affordable source for advertising and marketing information.

- Predictable Research
- Fast and easy online access
- Affordable flat fee

For more information or a  
free product demonstration,  
please call 1-800-3-DIALOG  
or visit our Web site at  
[www.dialog.com](http://www.dialog.com).

### **PREDICTABLE RESEARCH**

Prepare for a pitch, advise your clients more effectively, monitor industry trends – the information you need to accomplish all of this is in DialogPRO Advertising. In fact, all the top sources are in DialogPRO Advertising, including the following:

*Advertiser and Agency Red Books™*      *BrandWeek*  
*Advertising Age*                                      *Campaign*  
*AdWeek*

### **FAST AND EASY TO USE**

It's available through any standard Web browser from anywhere at any time, providing full access to an unrivaled collection of information.

### **AFFORDABLE FLAT FEE**

DialogPRO Advertising meets the needs of your business and your budget. Pay one fixed rate and go online as often as you want.



INFORMATION TO CHANGE THE WORLD



# Multi-mode research dos and don'ts

By Allen Hogg

*Editor's note: Allen Hogg is director of marketing for Burke Interactive, the Internet research support group at Burke, Inc., Cincinnati. He can be reached at allen.hogg@burke.com.*

**M**ulti-mode research is appropriate not only when companies like Fidelity want to give customers a choice of how to respond to surveys. It can also be a method for reducing survey coverage and non-response error in many other situations. (Coverage error occurs when individuals invited to participate in a survey are not representative of the target population. Non-response error occurs when individuals responding to a survey invitation differ from the entirety of those sampled.)

What is here being called multi-mode research should not be confused with, for example, a more traditional phone-mail-phone approach, in which respondents are recruited by telephone, sent some materials to examine, then called back to get their

responses to questions. Instead, multi-mode research here refers to using two or more data collection methods for the same study wave. Appropriate multi-mode applications include the following:

- When e-mail addresses are available for only part of the target population (a company's customer base being the most obvious example), e-mail invitations can be used to invite that segment to take an online survey, while more traditional recruitment and data collection methods are used for other segments of the population.

- When e-mail addresses are available for an entire population group, telephone "backfill" interviewing can be used to try to get responses from those who did not react to the initial e-mail invitation.

Providing a Web survey option as well as a telephone option can be particularly appealing when conducting customer satisfaction studies in business-to-business situations. Frequently, a telephone-only approach

to business-to-business customer satisfaction will require calling potential respondents so many times that the survey process itself has the potential to make the customer dissatisfied. It also has the potential to over-emphasize the views of customers who prefer a "high-touch" approach — and want lots of contact from sales representatives, for example — over more "high-tech" customers who would appreciate a more hands-off business relationship.

Multi-mode approaches can also prove beneficial for global research projects. In these situations, different data collection methods might be used as the "lead mode" in different countries. This has long been done with telephone and in-person interviewing — and now online options can be considered as well. Burke experience with multi-mode international projects has shown that, even when e-mail addresses are available for a global business-to-business customer base, the percentage of respondents using

key to the success of the project.

## Data differences

Although potential differences in response patterns for both scaled and open-ended questions had been an initial concern, Burke's experience led us to believe that telephone and Web responses would be, for the most part, comparable, and that the differences that did result were more likely to be attributed to differences among the populations choosing to respond to the two different methods and not purely method effects.

The surveys included three open-ended questions. The online response to these questions was excellent — quite comparable to that achieved via the telephone with interviewer prompts and follow-ups. For one general improvement question that everyone was asked to answer at the

end of surveys during the study's second wave, Web respondents typed in, on average, 168 characters and 29.4 words, while interviewers transcribed, on average, 160 characters and 29.7 words per telephone respondent.

Of course, online comments were captured as offered without an interviewer filter and the potential bias that represents. Although there is less opportunity for probing online, there is also no chance for responses to be affected by such factors as interviewers' training or style differences, typing speed, fatigue, speech patterns, or accents.

On many key demographic measures, the phone and Web respondent findings were also quite similar. The mean age was identical, and differences in mean household income, gender, and the percentage with

another Fidelity account were insignificant. Web respondents did not turn out to be longer users of the NetBenefits site, nor did they tend to have accessed it more recently.

On some "technographic" issues, however, Web respondents and phone respondents did differ significantly. Web respondents were significantly more likely to access the NetBenefits site from work as well as from home, and they were more experienced with the Internet, more involved with financial portals, and more experienced with online financial transactions, such as making bill payments and brokerage trades or mutual fund transactions.

Without providing a Web survey option, it is likely that the population of more sophisticated online financial consumers would have been under-represented in the sample, pos-



the Web will tend to be far greater in the United States and Canada than in any other area of the world.

Multi-mode projects can certainly demand more administration time than projects utilizing just one data collection mode. Companies may need to put together a Web survey program as well as a CATI script or paper survey instrument. There is also a need to be vigilant about sample management to avoid, for instance, calling respondents after they have completed Web surveys.

Questionnaires should also be designed with the aim of avoiding measurement error that might arise from differences in response patterns due to survey method. This is particularly a concern when a self-administered method, such as Web surveying, is combined with an interviewer-administered approach, such as telephone surveying. The goal of researchers should be to create questionnaires from which findings can be combined without any need for recalibrating results from one data collection method to make them comparable to the other. (There may still be differences in numbers, but they should be due to actual differences in the populations responding via various survey modes, not due to the survey instru-

ments themselves.)


The Fidelity experience reinforces Burke's finding that telephone interviewing will result in more use of scale end points when semantic rating scales are employed. When there is not a historical data record to consider, using numerical scales with anchored end points leads to much more comparable findings from phone and Web surveys.

Inclusion of "don't know" or "no response" options is also a key consideration. When such an option is included in a Web survey, the percentage of people using it will tend to be higher than it is for telephone surveys, particularly on sensitive issues. This makes sense when one considers that in telephone research, "don't know" responses are typically accepted by interviewers, but not volunteered as a possible option. On the other hand, omitting "don't know" or "no response" options has not been shown to increase Web survey dropout rates. "Forcing" people to respond does not seem to cause them to exit the survey.

Researchers do not, however, want to force people to respond when they might have no legitimate basis for an opinion. Burke's default approach has therefore been to leave out "don't

know" and "no response" options from Web surveys on items that will be key to the analysis of the study (with the exception of very sensitive items, such as household income), but to include them with, for example, attribute ratings, when the question might address some aspect of a product or service with which the respondent has no experience.

"Check all that apply" items are another area of concern. Typically, for telephone surveys, such items are structured as a series of "yes" and "no" responses. If not set up the same way for Web surveys, respondents will have a tendency to check only a few items, then move on without considering all the possibilities on the list.

Finally, it is also a good idea to avoid most of the whiz-bang capabilities of online surveying. Although the Web allows survey designers to use things like sliders and visual scale images instead of more traditional rating scales, such devices make it less likely that findings from online and other survey modes will be comparable. Simpler, familiar Web interfaces will serve companies better as they try to use multi-mode research to reduce non-response and coverage error without introducing measurement error into the process. 

sibly impacting actions taken as a result of the study. For example, in this year's second wave of the study, Web respondents were significantly less likely than phone respondents to have called a Fidelity representative in the three months prior to the survey. Without getting responses via the Web, Fidelity might have overestimated use of this information channel.

### Scale items

Several attribute ratings included in the study employed a five-point anchored scale used for surveys at Fidelity Investments, where the top box represents "strongly agree," the second box "somewhat agree," the midpoint "neither agree nor disagree," the next box "somewhat disagree," and the bottom box "strong-

ly disagree." Top two box on several key attributes did not significantly differ.

Web and phone response patterns were not, however, by any means the same. Phone respondents were more likely than Web respondents to use the top "strongly agree" response (as well as the bottom box "strongly disagree" response). Web respondents, on the other hand, were more likely to migrate away from the scale end points, tending toward more use of the "somewhat agree" and "neither agree nor disagree" options.

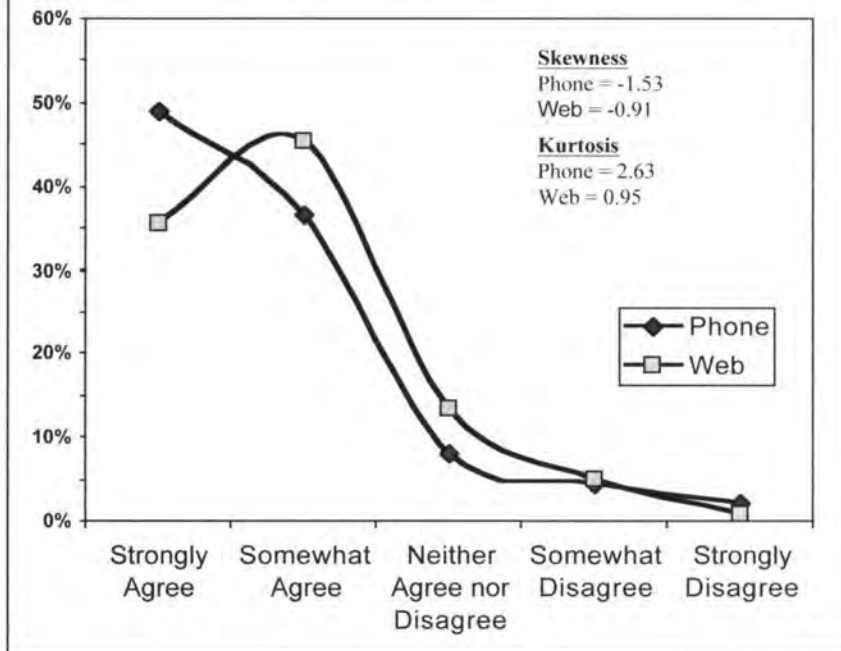
If these responses were converted to a five-point scale, it would show that the response pattern exhibited by Web respondents more closely matched a normal distribution than that of phone respondents (Figure 1). A normal distribution has both a skew

(a measure of symmetry) and a kurtosis (a measure of the "thickness" of its tails) of 0. For the phone respondents, the response pattern had a skew of -1.53 and a kurtosis of 2.63. For the Web respondents, the response pattern had a skew of -0.91 and a kurtosis of 0.95.

These findings confirmed previous research that Burke had performed (see sidebar), suggesting that contacts respond differently to scales they can see versus ones that are read to them — especially in use of end points. In particular, there are primacy and recency effects in phone surveys when completely anchored scales are used. That is, phone respondents have a greater tendency than Web respondents to remember and repeat the first and last scale point read by the interviewer. Web respondents, on the other hand, have a visual scale to look at for



Figure 1  
Average Ratings for Characteristic Attributes Using Repeated Agreement Scales



each attribute, perhaps drawing them toward the center of the scale.

The more predominant "top box" use among phone respondents suggest that studies employing a telephone-only design might be overstating the individuals' degree of satisfaction. Listening to interviews, it became clear that in many cases we were forcing contacts to use a scaled response, when in fact they were making dichotomous

yes/no judgments — either they were satisfied or were not. In such cases, a "strongly agree" response seems to become a proxy for a generally positive view and not necessarily an accurate representation of respondents' true feelings.


By using the common reporting standard of combining the "top two" positive and "bottom two" negative response options, we minimized the phone and

Web differential and presented numbers that were truer to the essentially dichotomous contact response. Other options are also being explored for future mixed-mode surveying. Because Web and phone responses have been shown to more closely match each other when numerical scales with anchored end points are used instead of completely anchored scales, making a change to this sort of scale has been proposed within Fidelity.

#### Caveats

While online-only survey formats will likely cost less than traditional telephone research, it should be noted that this isn't necessarily the case with mixed phone/Web approaches. In this case, there was a cost to set up both online and CATI survey programs, as well as expenses incurred in merging and testing independent data sets.

Also, all of the studies we've done with phone/online response options have been with contacts possessing substantial Web experience and a known comfort level in working with online material. The effectiveness of adding an online response option for less Web-savvy populations is suspect.

All trends, however, point to increasing use of multi-mode survey approaches. As CATI and Web survey systems become better integrated, any incremental costs produced by a multi-mode design should be reduced. Growing familiarity with managing information online should make adding a Web option viable for more and more target populations. And, of course, with traditional telephone research facing diminishing response rates, leading to rising costs and less credible results, trying new approaches simply becomes increasingly necessary. Adding an online response option has proved to be advantageous for our marketing research efforts and will likely be beneficial for many other research professionals. 

Track where they go *and* know what they think...

### Socratic Site Diagnostic<sup>SM</sup> Technology



**SOCRATIC**  
TECHNOLOGIES  
Interactive Marketing  
Research

1-800-5-Socratic  
www.sotech.com

Evaluate live Web sites on usability issues such as:

- < Quality of customer experience
- < Use and usefulness of specific features
- < Ease-of-interaction
- < Understandability of terms and icons
- < Graphic and layout communications

 **QuickLink**

For a look at how Web surveys compare to mail surveys, visit [www.quirks.com](http://www.quirks.com) and enter Article QuickLink number 702 ("A comparison of Internet and mail survey methodologies").





# ***Sampling That's Smart***

Scientific Telephone Samples (STS) offers a comprehensive array of random digit (RDD), listed, and business samples for marketing research. Since 1988, our commitment to quality, outstanding customer service, and the lowest prices has made STS the smart choice for accurate, timely, and productive sampling. Smart - because you'll always have the most

current data, on time, every time. Smart - because each sample is 100% guaranteed for quality. Smart - because you're saving money. Smart - because you can rest assured that our added dimension of broad-based research knowledge will help guarantee every sample developed by STS will be the finest available anywhere.



***RDD samples from 2¢ to 5¢ per number.  
Listed samples from 6¢ to 12¢ per number.***

***(800) 944-4-STC • (949) 461-5400 • [www.stssamples.com](http://www.stssamples.com) • [info@stssamples.com](mailto:info@stssamples.com)***

**STS**  
SCIENTIFIC  
TELEPHONE  
SAMPLES



## Product & Service Update

continued from p. 12  
visit [www.second-to-none.com](http://www.second-to-none.com).

### New online survey product from RDD

Research Data Design, Inc. (RDD), Portland, Ore., is now offering RDD Online, an online survey product. RDD has access to multiple sample sources, including Greenfield Online's panel of 1.2 million households and Greenfield Online's sampling relationship with the Microsoft Network. Each panel member participates voluntarily and completes more than 70 fields of demographic information. MSN visitors are invited to participate in online surveys via integrated links across all MSN channels, and are screened at the time of survey execution. For more information visit [www.research-datadesign.com](http://www.research-datadesign.com).

### Common Knowledge adopts Web survey monitoring system

Dallas-based Common Knowledge Research Services has adopted Surveyguardian, an online interviewing service developed by Western Wats Center, Inc. Common Knowledge is the first online interviewing service bureau to offer this service to customers conducting Web surveys. The service is available for customer-supplied lists as well as those using Common Knowledge's Your2cents.com online opinion panel. Surveyguardian enables live interviewers to administer and monitor Web surveys being completed by respondents in real-time. Powered by a chat engine process integrated with the

measurement metrics of the Common Knowledge survey engine, Surveyguardian allows live interviewers to verify respondent identity, probe and clarify open-ended responses, and offer in-survey respondent support. For more information visit [www.commonknowledge.com](http://www.commonknowledge.com).

### New auto-dialer for SmartQuest IVR software

Seattle-based research software firm TeleSage, Inc. has released DialQuest, a new auto-dialer add-on feature for its SmartQuest IVR survey software. DialQuest can supplement SmartQuest survey software with outbound dialing on each survey port. Users can import a list of phone numbers and choose which phone lines SmartQuest uses to conduct the outbound calling. Other features allow users to include data specific to each phone number, such as due dates, account numbers or balances, outstanding quantities or items, zip codes or other location information. SmartQuest can use this information to customize the survey presentation for each person. The new DialQuest includes the following features: customizable auto-retry for busy numbers and numbers that are not answered; answering machine detection; daily dialing schedule; quotas (stops dialing when customized completion criteria are met); and call transfer capabilities. For more information call 800-636-8524 or visit [www.telesage.com](http://www.telesage.com).

### Salu adds online research panel

Granite Bay, Calif.-based medical information firm Salu, Inc. has created an online market research panel to help pharmaceutical partners measure and tailor their education programs for physician-specialists enrolled in Salu's services. Salu began development of the market research panel with a sampling of its Dermdex (serving dermatologists and plastic surgeons) and NeuroHub (serving neurologists)

members. One hundred physicians were randomly selected to complete the eight-week survey, with an overall response rate of 75 percent.

Salu plans to expand its market research panel to include more physicians and to integrate the panel with Salu's other offerings to pharmaceutical partners. The research panel will be used to determine physician satisfaction of pharmaceutical programs, alongside Salu's proprietary CRM system, which tracks the results of both online and offline sales and marketing initiatives. For more information visit [www.salu.com](http://www.salu.com).

### SmartViewer Web Server 3.3 now shipping

Chicago-based SPSS Inc. has released SmartViewer Web Server 3.3, which enables organizations to deliver interactive SPSS analytical reports to audiences through a Web browser. The new personalization features in SmartViewer Web Server 3.3 give report viewers direct access to information without having to navigate to another page. Viewers can create their own version of a report home page by adding personalized content and links and reorganizing the position of objects on the page. Report viewers can also customize the look and feel of the home page by modifying default styles and colors. Personalization features geared to site administrators enable them to customize the Web template, style sheets and related configuration files, and control the level of personalization available to end users. In addition to SPSS Base, SmartViewer Web Server can also deliver reports generated from Microsoft Excel, Microsoft Word and other report software. Enhanced security is another benefit of SmartViewer Web Server 3.3. Document and category settings can now be applied to individual users as well as groups. The administrator can grant a group or user publishing rights to a category without granting rights to the parent category. The new security features of SmartViewer Web Server 3.3 also enable individual users to create new categories for their pub-

<b>Name Creation: Name Testing.</b>	Best New Product Branding <b>EDISON</b>
For Information Contact: John P. Hoepfner <b>(480) 488-9660</b> e-mail: <a href="mailto:namequest@aol.com">namequest@aol.com</a> <a href="http://www.namequestusa.com">www.namequestusa.com</a> P.O. Box 5587 • Carefree, AZ USA 85377	
<b>Name Quest</b> The Science of Name Creation	



# The Burke Institute

For the past 27 years, tens of thousands of research practitioners worldwide have turned to The Burke Institute, the premier provider of state of the art marketing research training, for their professional development needs. Please visit our web site for additional details about our programs including our inhouse/onsite customized programs; Certificate of Proficiency programs; special offers including 3, 6 and 12 month Burke Institute Pass Programs; and our recent joint venture announcement between ACNielsen Burke Institute and Burke Inc.

<http://www.BurkeInstitute.com>

## Seminar Dates and Locations from April–December 2002

### 101. Practical Marketing Research

Denver .....Apr 22-24  
Cincinnati .....May 29-31  
Los Angeles .....July 8-10  
New York .....Aug 12-14  
Atlanta .....Sept 23-25  
Chicago .....Oct 28-30  
Boston .....Dec 2-4

### 104. Designing Effective Questionnaires: A Step by Step Workshop

Atlanta .....April 2-4  
Denver .....June 4-6  
Chicago .....Aug 20-22  
Cincinnati .....Nov 5-7

### 106. Fundamentals of Internet Marketing Research Methods and Applications

New York .....May 6-7  
Atlanta .....Aug 6-7  
Chicago .....Oct 31-Nov 1

### 201. Getting the Most Out of Traditional & Online Qualitative Research

Denver .....April 25-26  
New York .....Aug 15-16

### 202. Focus Group Moderator Training

Cincinnati ..... May 7-10  
Cincinnati .....June 18-21  
Cincinnati .....Aug 27-30  
Cincinnati .....Oct 15-18  
Cincinnati .....Dec 10-13

### 203. Specialized Moderator Skills for Qualitative Research Applications

Cincinnati .....June 24-27  
Cincinnati .....Nov 12-15

### 205. Qualitative Research with Children

Chicago .....April 16

### 301. Writing and Presenting Actionable Marketing Research Reports

Chicago .....April 17-19  
Los Angeles .....July 17-19  
Cincinnati .....Oct 30-Nov 1

### 401. Managing Marketing Research to Enhance Accountability and ROI

Los Angeles .....July 15-16

### 501. Applications of Marketing Research

Los Angeles .....July 11-12  
Atlanta .....Sept 26-27  
Boston .....Dec 5-6

### 502. Product & Service Research

Chicago .....Aug 5-6

### 504. Advertising Research

Chicago .....Aug 7-8

### 505. Market Segmentation Research

Chicago .....June 4-5  
Los Angeles .....Sept 30-Oct 1

### 506. Customer Satisfaction Research

Chicago .....Sept 10-11

### 507. Analysis and Interpretation of Customer Satisfaction Data

Chicago .....Sept 12-13

### 508. Positioning Research

Chicago .....June 6  
Los Angeles .....Oct 2

### 509. Pricing Research

Chicago .....June 7  
Los Angeles .....Oct 3

### 601. Data Analysis for Marketing Research: The Fundamentals

Chicago .....Apr 15-16  
Los Angeles .....July 15-16  
Cincinnati .....Oct 28-29

### 602. Tools and Techniques of Data Analysis

Denver .....May 7-10  
Atlanta .....July 23-26  
Chicago .....Sept 24-27  
Las Vegas .....Nov 12-15

### 603. Practical Multivariate Analysis

Denver .....May 13-16  
Atlanta .....July 29-Aug 1  
Chicago .....Sept 30-Oct 3  
Las Vegas .....Dec 3-6

### 604. Translating Data Into Actionable Information: A Hands-on PC Based Workshop

Cincinnati .....Oct 8-10

### 605. Practical Conjoint Analysis and Discrete Choice Modeling

New York .....Apr 3-4  
Chicago .....Oct 15-16

### 701. Conducting Research in International Markets

New York .....May 6-7  
Chicago .....Sept 18-19

### 801. How to Use Marketing Information for Better Decision Making

New York .....May 21-22  
Chicago .....Sept 5-6

© 2002 ACNielsen Burke Institute

### TO REGISTER PLEASE CONTACT US AT:

Voice: 800-543-8635 or 859-905-4935 • Fax: 859-905-5028 • E-mail: [Linda.Thomson@BurkeInstitute.com](mailto:Linda.Thomson@BurkeInstitute.com)

### FOR ADDITIONAL INFORMATION OR DETAILS ABOUT OUR SEMINARS:

Please contact Mr. Jim Berling, Managing Director, or visit our web site at <http://www.BurkeInstitute.com>



lished documents (in previous releases only the administrator could create public categories). For more information visit [www.spss.com](http://www.spss.com) or call 800-543-2185.

## Book features research-based ad principles for non-profits

New York research firm RoperASW has launched a new book to help public interest advertisers create more effective ads. Written by Andy Goodman, *Why Bad Ads Happen to Good Causes* contains seven "print ad principles" based on a recently completed study of public interest advertising conducted by RoperASW, as well as eight decades of advertising research by the firm.

The book comprises 10 years of data (1990-2000) from RoperASW's print-ad database and evaluates the ability of ads from nonprofit organizations to capture and hold the attention of magazine and newspaper readers.

*Why Bad Ads Happen to Good Causes* reports that many non-profit organizations are spending a great deal of money on print advertisements that are not attracting reader attention. The book's principles are designed to help these organizations create more effective print advertising.

These seven principles are:

- capture the reader's attention like a stop sign and direct it like a road map;
- make an emotional connection before attempting to convey information;
- write headlines that offer a reason to read more;

- use pictures to attract and convince;
- if you want people to read your text, make it readable;
- test before, measure afterward; and
- when everyone zigs, it's time to zag.

In addition to explaining the principles, the book features 20 ads along with their scores, based on RoperASW's measure: "Noted," the percentage of readers who remember seeing the ad; "Associated," the percentage of readers who recalled the name of the advertiser or campaign; and "Read Most," the percentage of readers who read half or more of the written material in the ad. For more information visit [www.agoodmanonline.com](http://www.agoodmanonline.com).

## Results of Canadian media and consumer study available

BBM Canada (BBM), a non-profit tripartite industry organization providing ratings information for both radio and television to broadcasters, advertisers, and their agencies, has released results from RTS Canada, a study of the media and consumer preferences of Canadians.

RTS Canada data is based on a sample of more than 52,000 respondents. The study provides consumer purchase behavior data for a variety of goods and services categories integrated with media usage and lifestyle information. The study also includes detail at the regional and local levels in Victoria, Vancouver, Edmonton, Calgary, London, Kitchener, Toronto, Montreal, Quebec City, and Halifax.

Marketers and strategic business planners can mine the RTS Canada data for consumer statistics and preferences that are meaningful to their industry. Industries covered include: automotive, high-tech, financial, travel, telecom, retail, restaurants, home improvement, and sports and leisure. For more information call 416-445-9800.

## Briefly...

Executive Solutions, a Syosset,

N.Y. research firm, is offering a **free 12-week e-mail course about how to create an effective and enjoyable back room experience** for focus groups and individual interviews. The course is delivered in segments, one per week. To sign up, enter your e-mail address at [www.executive-solutions.com/tri/free/](http://www.executive-solutions.com/tri/free/).

U.K. research software firm Syclick Ltd. has launched a **support Web site for SySurvey**, its Web-based research tool. At [www.sysurvey.com](http://www.sysurvey.com), users can find a regularly-updated library of research tips and white papers, written by practitioners, academics, and students.

Research Triangle Park, N.C., research firm Johnston, Zabor, McManus, Inc. (JZM) has identified an initial set of discrete **tactics that directly influence a pharmaceutical brand Web site's key value delivery drivers**. The tactics are comprised of physical Web site design, navigation, and presentation elements that positively and negatively impact the 21 Value Dimension Drivers used to derive a pharmaceutical Web site's Visitor Value Index (VVI) – JZM's indicator of the value a Web site delivers to all visitors. For more information contact Brad Martin at 800-735-5448 or visit [www.jzm.com](http://www.jzm.com).

ACNielsen U.S. has launched Homescan RX/OTC Consumer Panel, a new research service that **measures consumer purchases and use of prescription and over-the-counter medicines**. The service uses ACNielsen's nationally representative Homescan consumer panel to track the types of ailments people suffer, the remedies they purchase, and the remedies they actually use. The service also measures patient adherence to prescribed regimens and analyzes why consumers choose various treatment options. For more information visit [www.acnielsen.com](http://www.acnielsen.com).

### U.S. Hispanic Research

Explore. Interpret. Empower.®

Encuesta, Inc.

4990 SW 72 Avenue, Suite 110

Miami, FL 33155-5524

(305) 661-1492 (800) 500-1492

[www.encuesta.com](http://www.encuesta.com) [info@encuesta.com](mailto:info@encuesta.com)





## Qualitatively Speaking

continued from p. 16

which, as described at the outset of this article, is properly defined as the entire universe of people who already do or plausibly could use the product or service at issue. Failure to engage this larger population — on its own terms — is to turn one's back on a ready-made opportunity for business growth.

### A second case in point

In this connection, a recent study dealt with a particular electronic instrument commonly found on the benches or nearby equipment racks of R&D and manufacturing test engineers. Focus groups were conducted to obtain this population's reactions to, and development directions for, a rather advanced new version of the instrument, intended as a replacement for the existing flagship model.

Client observers grew increasingly restive as the great majority of participants evidenced indifference, confusion, or even anxiety regarding the


offering. Again the refrain: "That's not our customer!" The client had anticipated that the market consisted mainly of "power users" who would easily relate to and appreciate the new features and elegant engineering of the new instrument. But it turned out that by far the bulk of the market consists of people whose infrequent use and comparative unfamiliarity with the product led them to favor older, simpler models that require less relearning each time.

"That's not our customer"? Excuse me.

Now, there may well be a niche opportunity for the advanced instrument among the small minority of sophisticated users; but that's a separate and different issue from the one addressed by the research. Remember, the new offering was conceived as a replacement for the company's main entry in the product class, intended to appeal to the broadest user population. In that context, wouldn't the client have been well advised to focus on the unanticipated finding that the main-

stream market's level of familiarity, comfort, and confidence regarding this tool was very low? Indeed, users suspected — quite rightly — that even their current models had greater capability/more features than they knew what to do with.

No great conceptual leap was required to see the business planning implications here: Quite apart from more modest technological guidelines for new product development, there was unmistakable potential for increasing sales of the company's current offerings — through information- and education-oriented marketing communications aimed at countering the uncertainty and timidity surrounding use of the product. The icing on the cake of this opportunity was that, because of the market's sporadic use and comparative unfamiliarity with this product, price, per se, was not nearly as important a purchase criterion as it was for many other instruments.

"That's not our customer"? Please. Hold the tail still while I wag the damn dog. 

## Our Clients Sleep Great



**PRECISION**  **RESEARCH**

In fact, our clients sleep so well when working with us some refer to Precision as their "I can sleep at night recruiting service". That is how we like to be viewed. You have plenty to be concerned about without having to worry whether the field service you selected is diligently working on and managing your project from start to finish. We refuse to use home recruiters or outside recruiting services because we simply can't control the quality. All our recruiting is done in house under close supervision. So why worry? Call Precision and get a good night's rest so you can be at your best. We'll see you at the group.

CALL 847•390•8666 or visit our Web Site: [www.preres.com](http://www.preres.com)



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](http://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](mailto:jeff@jeffandersonconsulting.com)  
Contact: Jeff Anderson, CPCM, MBA  
"Blending Art With Science." Member  
ORCA/AMA.

## AutoPacific

#### AutoPacific, Inc.

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



Qualitative  
MarketView™

#### BAIGlobal Inc.

580 White Plains Rd.  
Tarrytown, NY 10591  
Ph. 914-332-5300  
Fax 914-631-8300  
E-mail: [kpermut@baiglobal.com](mailto: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](mailto: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](mailto:crobinson@crmarket.com)  
[www.crmarket.com](http://www.crmarket.com)  
Contact: Cheryl 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](mailto:cjrobbins@activefocus.com)  
[www.activefocus.com](http://www.activefocus.com)  
Contact: Carole J. Robbins  
Member: National Assoc. of Practicing  
Anthropologists & Qualitative Research  
Consultants Assoc. (QRCA).



#### 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](mailto:info@crresearch.com)  
[www.cr-research.com](http://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](mailto:ncalo@caloresearch.com)  
[www.caloresearch.com](http://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](mailto:walt@postslot.com)  
[www.focusgroupguru.com](http://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@cambridgere-search.com](mailto:dalelongfellow@cambridgere-search.com)  
[www.cambridgere-search.com](http://www.cambridgere-search.com)  
Contact: Dale Longfellow  
High Tech, Executives, Bus. -To-  
Bus., Ag., Specifying Engineers.



#### 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](mailto:marylou@campos.com)  
[www.campos.com](http://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@crwis.com](mailto:quirks@crwis.com)  
[www.crwis.com](http://www.crwis.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: [tkorzenny@cheskin.com](mailto:tkorzenny@cheskin.com)  
[www.cheskin.com](http://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](mailto:sheilake@aol.com)  
[www.CompetitiveEdge.com](http://www.CompetitiveEdge.com)  
Contact: Sheila Kessler, Ph.D.  
B2B; Hi-Tech; Full-Service; Customer  
Needs/Satisfaction; Focus; ISO.



#### Consumer Dynamics and Behavioral Analysis, LLC

8 Goodale Road  
Newton, NJ 07860-2782  
Ph. 973-383-7028  
Fax 973-383-6058  
E-mail: [izaback@cdandba.com](mailto:izaback@cdandba.com)  
[www.cdandba.com](http://www.cdandba.com)  
Contact: Larry A. Zaback  
Strategically Focused, Actionable  
Consumer Insights. Proprietary  
Behavioral Research Techniques.

#### 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](mailto:sstewart@consumerfocusco.com)  
[www.consumerfocusco.com](http://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](mailto:kpopp@columbus.rr.com)  
Contact: Kathy Popp  
Expert Moderator & Marketer with More  
Than 15 Years of Experience! Great  
Groups, Insights & Reports!



#### Creative Focus, Inc.

1120 Hope Rd., Suite 150  
Atlanta, GA 30350  
Ph. 404-256-7000  
Fax 770-594-2475  
E-mail: [vardis@mindspring.com](mailto:vardis@mindspring.com)  
[www.creativefocus.net](http://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](mailto: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](mailto:sdaniel@earthlink.net)  
<http://home.earthlink.net/~sdaniel/>  
Contact: Stephen Daniel  
FOCUS/IT Understanding Technology  
Buying Processes.

#### 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 Greenwch 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.

### Erlch 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 Erlch, Ph.D.  
Full Svc. Latino, Asian, African-Amer.,  
Amer. Indian Mktg. Rsch.

## 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@gqq-mr.com  
www.gqq-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.

### 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.



### Insights Marketing Group, Inc.

2512 Swanson Ave.  
Miami, FL 33133  
Ph. 305-854-2121  
Fax 305-854-2130  
E-mail: belkist@insights-marketing.com  
www.insights-marketing.com  
Contact: Belkist E. Padilla, President  
Contact: Gloria Cantens, Dir. Qual. Rsch.  
Full-Service Qualitative Research.  
Experienced in Multicultural. Better  
Thinking. Better Qualitative.



### 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.

## JUST THE FACTS<sup>®</sup> YOUR INFORMATION SOURCE

### Just The Facts, Inc.

P.O. Box 365  
Mt. Prospect, IL 60056  
Ph. 847-506-0033  
Fax 847-506-0018  
E-mail: facts2@interaccess.com  
www.justthefacts.com  
Contact: Bruce Tincknell  
Highly Skilled; Well Organized;  
Maintains Control, While Enabling  
Creative Flow; Strategic Moderating;  
Actionable Results; 25 Years Experience.

### 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.

### 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.





**Market Navigation, Inc.**  
60 Dutch Hill Rd.  
Orangeburg, NY 10962  
Ph. 845-365-1391 ext. 228  
Fax 845-365-1022  
E-mail: eve@mnnav.com  
E-mail: grs@mnnav.com  
www.mnnav.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 Rsch. Cnsts., 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  
www.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.**  
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**  
RESEARCH, INC.  
**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 Herlock 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.

**QualCore.com Inc.**  
17 Washburn Ave. S.  
Minneapolis, MN 55405  
Ph. 612-377-3439  
Fax 612-377-3504  
E-mail: jeff.walkowski@qualcore.com  
www.qualcore.com  
Contact: Jeff Walkowski  
Flexible and Practical. Online Qualitative  
Pioneer. QRCA Member. RIVA Trainer.  
20+ Years In Research.

**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.

**Pamela Rogers Research, LLC**  
2759 Fourth St.  
Boulder, CO 80304  
Ph. 303-443-3435  
Fax 303-443-3621  
E-mail: pamelarogers@aol.com  
www.pamelarogersresearch.com  
Contact: Pamela Rogers  
Since 1985, Exceptional, Full-service  
Qualitative in Many Categories; U.S. and  
International.

#### 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 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.



**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.

**SRA Research Group, Inc.**  
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.

**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.

**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.



## 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  
Erich Transcultural Consultants  
Marketing Matrix International, Inc.  
Meczka Mktg./Rsch./Cnsltg., Inc.

### Colorado

Cambridge Associates, Ltd.  
Pamela Rogers Research, LLC

### Florida

Encuesta, Inc.  
Insights Marketing Group, Inc.  
Loretta Marketing Group  
SIL Group  
SRA Research Group, Inc.

### Georgia

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

### Illinois

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

### Kentucky

Cultural Insights Services, Inc.

### Massachusetts

Daniel Associates  
Dolobowsky Qualitative Services, Inc.

### Minnesota

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

### New Jersey

Consumer Dynamics and Behavioral  
Analysis, LLC  
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

### 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.  
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  
Erich Transcultural Consultants  
Fader & Associates  
Focus Latino  
GQG  
Image Engineering, Inc.  
Insights Marketing Group, Inc.  
Millennium Research, Inc.  
Outsmart Marketing  
The Research Department  
Pamela Rogers Research, LLC  
Jay L. Roth Associates, Inc.  
Saurage Research  
Paul Schneller Qualitative LLC

### AFRICAN-AMERICAN

C R Market Surveys  
Cultural Insights Services, Inc.  
Erich Transcultural Consultants  
Henceforth, Inc.

### AGRICULTURE

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

### ALCOHOLIC BEV.

C&R Research Services, Inc.  
Insights Marketing Group, Inc.  
James Spanier Research

### ARTS & CULTURE

Strategic Focus, Inc.

### ASIAN

Cultural Insights Services, Inc.  
Erich Transcultural Consultants

### ASSOCIATIONS

Market Navigation, Inc.

### AUTOMOTIVE

AutoPacific, Inc.  
C&R Research Services, Inc.  
Consumer Dynamics and Behavioral  
Analysis, LLC

Design Forum Research  
Focus Latino  
Erich 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  
Fader & Associates  
FOCUSED Marketing Research, Inc.  
Just The Facts, Inc.  
Knowledge Systems & Research, Inc.  
Leichliter Ascts. Mkt. Rsch./Idea Dev.

Market Navigation, Inc.  
MCC Qualitative Consulting  
Millennium Research, Inc.  
QualCore.com Inc.  
The Research Department  
Pamela Rogers Research, LLC  
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  
Just The Facts, Inc.  
Market Navigation, Inc.

### COMMUNICATIONS RESEARCH

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



## COMPUTERS/HARDWARE

GQG  
Leichliter Ascts. Mkt. Rsch/Idea Dev.

## 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  
Just The Facts, Inc.  
Knowledge Systems & Research, Inc.  
Marketing Advantage Rsch. Cnslts.  
QualCore.com Inc.  
The Research Department  
Jay L. Roth Associates, Inc.  
Saurage Research

## CUSTOMER SATISFACTION

BAIGlobal Inc.  
Competitive Edge  
GQG

## DIRECT MARKETING

BAIGlobal Inc.  
Consumer Focus LLC  
Strategic Focus, Inc.

## DISTRIBUTION

Burr Research

## EDUCATION

Cambridge Associates, Ltd.  
Just The Facts, Inc.  
Leflein Associates, Inc.  
Market Navigation, Inc.  
Marketing Advantage Rsch. Cnslts.

## EMPLOYEES

Primary Insights, Inc.

## ETHNIC/MULTICULTURAL RESEARCH

Cheskin

## ETHNOGRAPHIC RESEARCH

Alexander + Parker  
BAIGlobal Inc.  
C&R Research Services, Inc.  
Cheskin  
Consumer Dynamics and Behavioral Analysis, LLC  
Cultural Insights Services, Inc.  
Insights Marketing Group, Inc.  
Primary Insights, Inc.

## EXECUTIVES

BAIGlobal Inc.

C&R Research Services, Inc.  
Calo Research Services  
Decision Drivers  
Fader & Associates  
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.  
Insights Marketing Group, Inc.  
Leichliter Ascts. Mkt. Rsch/Idea Dev.  
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  
Outsmart Marketing  
Just The Facts, Inc.  
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.  
MedProbe™ Inc.  
Saurage Research

## HIGH-TECH

Jeff Anderson Consulting, Inc.  
BAIGlobal Inc.  
Calo Research Services  
Cheskin  
GQG  
Leflein Associates, Inc.  
QualCore.com Inc.  
Jay L. Roth Associates, Inc.

Saurage Research  
James Spanier Research

## HISPANIC

C&R Research Services, Inc.  
Cheskin  
Cultural Insights Services, Inc.  
Encuesta, Inc.  
Erlich Transcultural Consultants  
Focus Latino  
Hispanic Research Inc.  
Insights Marketing Group, 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.

Consumer Dynamics and Behavioral Analysis, LLC  
Primary Insights, Inc.

## IDEA GENERATION

BAIGlobal Inc.  
GQG  
Just The Facts, Inc.  
Primary Insights, Inc.

## IMAGE STUDIES

Cambridge Associates, Ltd.  
Cultural Insights Services, Inc.  
Saurage Research

## INSURANCE

Burr Research  
Consumer Focus LLC  
Leichliter Ascts. Mkt. Rsch/Idea Dev.

## INTERACTIVE PROD./SERVICES/RETAILING

Leichliter Ascts. Mkt. Rsch/Idea Dev.

## INTERNATIONAL

Fader & Associates  
Primary Insights, Inc.  
Pamela Rogers Research, LLC

## INTERNET

BAIGlobal Inc.  
C&R Research Services, Inc.  
Calo Research Services  
Fader & Associates  
FOCUSED Marketing Research, Inc.  
GQG  
Knowledge Systems & Research, Inc.  
Leichliter Ascts. Mkt. Rsch/Idea Dev.  
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.  
Insights Marketing Group, Inc.  
Loretta Marketing Group

## MEDICAL PROFESSION

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

## MODERATOR TRAINING

Market Navigation, Inc.  
QualCore.com Inc.

## MULTIMEDIA

Marketing Advantage Rsch. Cnslts.

## NAME GENERATION TESTING

Consumer Dynamics and Behavioral Analysis, LLC

## NEW PRODUCT DEV.

BAIGlobal Inc.  
C.J. Robbins Research  
C&R Research Services, Inc.  
Cambridge Associates, Ltd.  
Cheskin  
Consumer Dynamics and Behavioral Analysis, LLC  
ConsumerSpeak  
Cultural Insights Services, Inc.  
Fader & Associates  
GQG  
Just The Facts, Inc.  
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.

Consumer Dynamics and Behavioral Analysis, LLC  
Cultural Insights Services, Inc.  
Primary Insights, Inc.

## ONLINE FOCUS GROUPS

C&R Research Services, Inc.  
Cambridge Associates, Ltd.  
Insights Marketing Group, Inc.  
QualCore.com Inc.



# Moderator MarketPlace™

Saurage Research

## PACKAGED GOODS

BAIGlobal Inc.  
C.J. Robbins Research  
C&R Research Services, Inc.  
Cheskin  
Consumer Dynamics and Behavioral Analysis, LLC  
ConsumerSpeak  
Cultural Insights Services, Inc.  
Insights Marketing Group, Inc.  
Just The Facts, Inc.  
Jay L. Roth Associates, Inc.

## PACKAGE DESIGN RESEARCH

C&R Research Services, Inc.  
Consumer Dynamics and Behavioral Analysis, LLC  
ConsumerSpeak  
Cultural Insights Services, 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  
Franklin Communications  
Leichliter Ascts. Mkt. Rsch/Idea Dev.  
Market Navigation, Inc.

MCC Qualitative Consulting  
MedProbe™ Inc.  
Pamela Rogers Research, LLC  
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.  
Pamela Rogers Research, LLC

## 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

Leflein Associates, Inc.

## TOYS/GAMES

C&R Research Services, Inc.  
Fader & Associates

## TRANSPORTATION SERVICES

Strategic Focus, Inc.

## TRAVEL

Cambridge Associates, Ltd.  
James Spanier Research

## UTILITIES

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

## VETERINARY MEDICINE

FOCUSED Marketing Research, Inc.  
Paul Schneller Qualitative LLC

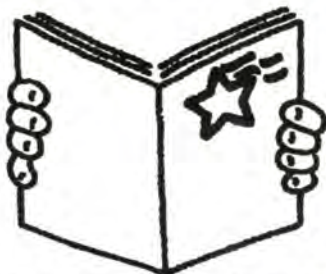
## WEALTHY

Leflein Associates, Inc.

## YOUTH

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

# This could be a best seller. But it's free.



You can't buy the Consumer Information Catalog anywhere. But you can send for it, free!  
It's your guide to more than 200 free or low-cost government publications about getting federal benefits, finding jobs, staying healthy, and more.

The Catalog is free. The information is priceless. Send name and address to:

**Consumer Information Center  
Department BEST, Pueblo, Colorado 81009**



# Index of Advertisers

ACNielsen Burke Institute .....95 Ph. 800-543-8635 • www.BurkeInstitute.com	Encuesta, Inc. ....96 Ph. 800-500-1492 • www.encuesta.com	National Survey Institute .....72 Ph. 877-674-7655 • www.NationalSurveyInstitute.com
ActiveGroup, Inc. ....29 Ph. 770-449-6767 • www.activegroup.net	Erlich Transcultural Consultants .....15 Ph. 818-226-1333 • www.etcethnic.com	The Olson Research Group, Inc. ....45 Ph. 609-882-9888 • www.olsononlinesystems.com
ADAPT, Inc. ....82 Ph. 888-522-3278 • www.adeptdata.com	Fieldwork, Inc. ....39 Ph. 773-282-2911 • www.fieldwork.com	On-Line Communications, Inc. ....37 Ph. 918-338-2000 • www.on-linecom.com
Affordable Samples, Inc. ....52 Ph. 800-784-8016 • ASISAMPLING@compuserve.com	Fleetwood Group, Inc. ....42 Ph. 888-820-8285 • www.repliesystems.com	Opinion Search, Inc. ....Back Cover Ph. 800-363-4229 • www.opinionsearch.com
The Analytical Group, Inc. ....75 Ph. 800-946-2767 • www.acsinfo.com	Fleischman Field Research .....85 Ph. 800-277-3200 • www.frsf.com	Polk Research Sampling .....61 Ph. 888-225-1434 • www.polk.com
Apian Software, Inc. ....57 Ph. 800-237-4565 • www.apian.com	FocusVision Network, Inc. ....6-7 Ph. 203-961-1715 • www.focusvision.com	Precision Research, Inc. ....46, 97 Ph. 847-390-8666 • www.preres.com
Burke, Inc. ....65 Ph. 513-576-5700 • www.burke.com	FocusVision VideoMarker, Inc. ....24, 25 Ph. 203-961-1715 • www.focusvision.com	Principles of Marketing Research .....53 Ph. 706-542-6692 • www.gactr.uga.edu/fis/mr/
C&R Research Services, Inc. ....3 Ph. 312-828-9200 • www.cr-research.com	FocusVision VideoStreaming, Inc. ....26 Ph. 203-961-1715 • www.focusvision.com	Pulse Train Technology, Ltd. ....41 Ph. 561-842-4000 • www.pulsetrain.com
Common Knowledge Research Services .....71 Ph. 800-710-9147 • www.commonknowledge.com	Global Market Insite (GMI) .....67 Ph. 425-369-0197 • www.gmi-mr.com	The Research Spectrum .....78 Ph. 415-543-3777 • www.researchspectrum.com
Communications Center, Inc. ....Inside Front Cover Ph. 866-YOUR-CC • wwwccicorporate.com	GroupNet .....69 Ph. 800-288-8226 • www.group-net.com	P. Robert & Partners .....5 Ph. [41] 21-802-8484 • www.probert.com
Communiqué Partners .....56 Ph. 415-453-9030 • www.CommuniquePartners.com	Harris Interactive .....Inside Back Cover Ph. 716-272-8400 • www.harrisinteractive.com	Sawtooth Software, Inc. ....72 Ph. 360-681-2300 • www.sawtoothsoftware.com
Computers for Marketing Corp. (CMC) .....40 Ph. 415-777-0470 • www.cfm.com	I Think, Inc. ....30 Ph. 214-855-3777 • www.ithinkinc.com	Sawtooth Technologies .....60 Ph. 847-866-0870 • www.sawtooth.com
Consumer Opinion Services, Inc. ....84 Ph. 206-241-6050 • www.cosvc.com	I/H/R Research Group .....48 Ph. 702-734-0757 • IHRRA2@aol.com	Schlesinger Associates .....9 Ph. 732-906-1122 • www.schlesingerassociates.com
Consumer Pulse, Inc. ....58 Ph. 800-336-0159 • www.consumerpulse.com	Insight Express, LLC .....13 Ph. 877-329-1552 • www.insightexpress.com/proven	Scientific Telephone Samples .....93 Ph. 800-944-4787 • www.stssamples.com
Consumer Surveys Co. ....79 Ph. 847-394-9411 • consumersurveys1@aol.com	Interviewing Service Of America .....77 Ph. 818-989-1044 • www.isacorp.com	SmartRevenue.com .....55 Ph. 301-770-8600 • www.smartrevenue.com
Cultural Access Group .....59 Ph. 650-965-3859 • www.accesscag.com	JRA, Marketing Research .....73 Ph. 215-822-6220 • www.reckner.com	Socratic Technologies, Inc. ....92 Ph. 415-430-2200 • www.sotech.com
Data Recognition Corporation .....23 Ph. 612-935-5900 • www.datarecognitioncorp.com	Language Logic .....81 Ph. 513-241-9112 • www.languagelogic.net	Sorensen Associates .....83 Ph. 800-542-4321 • www.sorensen-associates.com
Database Sciences, Inc. ....49 Ph. 800-742-6035 • www.dbciences.com	Maritz Research .....19 Ph. 800-446-1690 • www.maritzresearch.com	SPSS MR .....33 Ph. 513-552-8700 • www.spss.com/spssmr
Decision Analyst, Inc. ....63 Ph. 817-640-6166 • www.decisionanalyst.com	Market Probe, Inc. ....10 Ph. 414-778-6000 • info@marketprobe.com	Survey Sampling .....35 Ph. 203-255-4200 • www.surveysampling.com
Delve .....51 Ph. 800-325-3338 • www.delve.com	Marketing Systems Group .....17 Ph. 800-336-7674 • www.m-s-g.com	Telepoll Canada, Inc. ....47 Ph. 800-743-6443 • www.telepoll.net
Development II, Inc. ....78 Ph. 203-263-0580 • www.development2.com	MarketResearch.com .....43 Ph. 800-298-5699 • www.marketresearch.com	Test Track Research, Inc. ....32 Ph. 973-360-1660 • testtrack@compuserve.com
Dialog Corporation .....89 Ph. 800-334-2564 • www.dialog.com	MORPACE International, Inc. ....31 Ph. 800-878-7223 • www.morpac.com	Tragon .....68 Ph. 650-365-1833 • www.tragon.com
Discovery Research Group .....11 Ph. 714-261-8353 • www.drgutah.com	NameQuest, Inc. ....94 Ph. 480-488-9660 • www.namequest.com	Western Wats Center .....27 Ph. 801-373-7735 • www.SurveyGuardian.com



## Supplier Side

continued from p. 106

the projects they sell, and because some enjoy the research more than the sales, successful research companies need sales leadership. This usually comes from an owner or top person who champions business development and is out frequently with clients. Often this person is more sales-oriented: believing in growth and enjoying the sales process.

Even if this person does not directly supervise all of the salespeople (who may be his or her partners), he or she moves marketing initiatives forward and keeps people from forgetting about new business due to the press of existing project work. By setting well-defined, individualized goals for each person and continuously monitoring performance against those goals, the sales leader helps everyone to stay focused on business development.

This person can lead by example and serve as a role model to mid-level staff members. Especially in the development of new accounts, someone who leads by example can show people that calling on new prospects is not as scary as it looks, and that persistence and tact are key to getting that first RFP.

Some managers try to lead from the back of the battalion, by exhorting others to attend conferences and make sales calls without doing so themselves. Just as in raising kids, this "do as I say, not as I do" approach is usually not effective.

### Matching the people to the task

No one would give a complex multi-country, multi-variate study to a project manager whose background is mainly qualitative. At the same time, some companies will ask everyone on their sales staff to sell in the same way. Given the different talents and personalities of the staff involved, that rarely makes sense.

People who enjoy the thrill of the chase will be best in client offices, opening up new relationships or closing important sales. Others will do better writing articles in client industry publications, speaking at conferences where clients are present, or building personal relationships with clients that can increase "share of wallet." Most account execs will benefit from goals for specific activities and regular monthly reporting on actions taken toward those goals, but the each salesperson's goals should be take advantage of his or her strengths and motivations.

### Celebrate sales

Particularly among custom research companies that do high-end work, it is often a point of pride that the senior people who sell a project remain closely involved with it through completion. Some companies will say, "we have no sales people" — meaning that the same people

sell and deliver. The same thing is true in other professions such as accounting, law, and architecture, and it's something that many clients like to hear. However, this positioning can send an unintended internal message: that selling is an unworthy skill, a necessary evil that lets us carry out our craft. If you want your company to grow and prosper, this is not a message to send.

Successful research companies celebrate sales as the lifeblood of their business. They track sales by account exec, publicly recognize sales achievement, and compensate salespeople for their performance. Regular sales meetings allow account execs to share ideas and reinforce the importance of the sales process. While not diminishing the importance of design, project management, and analysis, successful companies communicate by word and deed that selling is where their business begins. **TM**

## Classified Ads

### Connecticut's Two Top Facilities



**Hartford Research** (860) 529-8006  
**New Haven Research** (203) 234-9988  
ctconnection.com



### THE QUESTION SHOP, inc.

A Marketing Research Firm  
Focus Groups and All  
Types of Surveys

RYAN REASOR  
President

2860 N. Santiago Blvd.  
Suite 100  
Orange, CA 92667  
(714) 974-8020  
FAX: (714) 974-6968



For Internet interviewing as easy as the click of a mouse, contact

**web-interviewing.com**

The Internet Field Service™

678/393-3717-voice

770/552-7719-fax

info@web-interviewing.com

web-interviewing.com, incorporated  
500 Sun Valley Drive • Suite D-2 • Roswell, GA 30076



# Supplier Side

## *Managing the full-service sales force*

By Michael Mitrano

*Editor's note: Michael Mitrano is a principal at Transition Strategies Corporation, a management consulting and mergers and acquisitions advisory firm serving the research industry. He can be reached at [mmitrano@transitionstrategies.com](mailto:mmitrano@transitionstrategies.com).*

**O**n some days, managing a group of full-service research account executives can be like herding cats. Once in a while, it can resemble a catfight. If you are a group head or company owner, how can you more effectively manage the people who bring in your business? To manage people, you need to appreciate and work with their motivations — so let's start there.

### **Why do researchers go into sales in the first place?**

Most market researchers are data-oriented people, which is not a personality that we associate with sales. At the same time, because custom market research is a professional service, clients expect that the people selling research to them will be researchers who understand their needs and will remain involved in fulfilling them. To a large extent, the

custom research account executive is selling herself or himself. For these reasons, research sales people are different than many other B2B account executives.

Some researchers gravitate toward sales because they do enjoy the challenge of the selling process — they like to convince, win, and build successful business relationships. Many are motivated toward sales because they see it as a path to work advancement and increased personal income. Quite a few, however, are drawn to sales because it means greater independence. By developing their own clients, they get to work on their own projects rather than those handed to them by a group head or partner. As their base of business increases, their oversight comes more from clients than from their bosses. They have greater control over the kind of work they do, how it's done, and when things are due than if they worked under someone else. Selling lets them do research the way they want to do it, within the constraint of client requirements. It also gives them job security.

Given this, it's not surprising that some researchers will build their

business up to the point when they (and perhaps a small junior staff) are fully booked, and then stop. These researchers will take on new business development only after their established business falls off. They may do quality work at excellent profit margins, but they will limit their own sales growth because too large a book of business will take them away from the work they love to do. Handing off ad hoc work to others is more difficult than when the research follows a standardized "product" approach. Clients also may insist that they remain closely involved with the research's execution. Notwithstanding these researchers' good qualities, they are not the people who you want developing your future sales talent.

Understanding — and discussing — the motivations of each sales staff member as well as those coming up the ranks will help you develop people and make the right fit between tasks and abilities.

### **Leading by example**

Because many research account execs are involved in carrying out

continued on p. 105





# RESPONSES

I N J U S T

## Harris Interactive QuickQuery<sup>SM</sup> 2,000 Responses – 2 Days

QuickQuery is an omnibus survey that leverages the power of the Internet to quickly and economically answer your toughest consumer-based questions.

Our survey consultants will work with you to finalize your questions, and in just two days you'll have accurate, projectable results. And with more than 2,000 completed interviews nationwide, your data will have twice the depth and detail of competitive omnibus services.

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

For more information please call 877.919.4765 or visit our website: [www.harrisinteractive.com/qq](http://www.harrisinteractive.com/qq)



**DAYS\***

 **HarrisInteractive<sup>SM</sup>**

MARKET RESEARCH

Harris Heritage. Interactive Power.

\*Two business days (holidays and weekends excluded).



[www.harrisinteractive.com](http://www.harrisinteractive.com) Tel 877.919.4765

©2002, Harris Interactive Inc. All rights reserved. 36USC220506 EOE M/F/D/V 07.02



# FIELD BUDGET TIGHT? BUY CANADIAN, EH.

250 state-of-the-art CATI stations.  
Professional, college-educated interviewers.  
Predictive dialing capabilities.  
Real-time data access.  
Get it all at a lower cost.

**Make the right choice.**

Call the leader in data collection

**800-363-4229**

[www.opinionsearch.com](http://www.opinionsearch.com)



T O R O N T O • O T T A W A • M O N T R E A L