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July/August 2003

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- 10 steps to greater Web survey response rates
- Can you trust your online sample?
- Measuring the impact of survey length on research findings



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Volume XVII Number 7

July/August 2003

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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: 952-854-8181; 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.

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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.

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Internet access numbers still climbing

Recent global research from Nielsen/NetRatings shows that the number of people worldwide with Internet access via a home PC grew steadily from 580 million people in Q4 2002 to 585 million in Q1 2003.

The U.S. leads with the largest Internet population, accounting for 30

percent of their Web usage. These four are the clear leaders across key statistics, including the percentage of people with access to the Internet via a home PC (all countries are 57 percent or more); percentage that own/lease a home PC (all 64 percent or more); and high Internet connection rates (all 80 percent or more) for those who have a PC in their home.

Compared to a year ago, 56k modems are being replaced by high-speed Internet access. All countries have experienced an increase in the percentage of households with broadband connection since Q1 2002, with the exception of Germany and Italy. Sweden and Brazil had the largest percentage increase (16 percent) in broadband connection since last year, while Hong Kong continues to be the leading country, with a significantly higher percentage of broadband connections than low-speed connections (65 percent vs. 16 percent).

Brazil displays potential for future growth: an additional 21 percent of the telephone household population plans to acquire Internet access in the next 12 months. For more information visit www.netratings.com.

Pre-movie ads OK, people say

American cinema audiences regard advertising before movies as more interesting than ads seen on television and more acceptable than ads on the Internet, according to a study by Arbitron Inc., New York.

"The Arbitron Cinema Study: Appointment Viewing by Young, Affluent, Captive Audiences" reveals that over two-thirds of moviegoers and seven out of every 10 young adults age 12-24 said they did not mind the advertising that plays before a movie begins. The complete study is available for free download at www.arbitron.com.

Four national research surveys were

conducted by Arbitron to probe America's cinema advertising exposure, cinema habits and exposure to media. Research began in July 2002 and the subsequent surveys were conducted in December 2002, and January and April 2003. Audience trends for each survey were compiled using frequency of attendance, including "last week," "last month" and "last three months." The research also includes information from Scarborough Research.

Moviegoers arrive at the theater early and are aware of their enhanced media environment. Adults who frequent the theater monthly tend to arrive, on average, 19 minutes early. This allows ample time for a variety of media to reach consumers including tickets, posters, concessions, music and video programming in the lobby and the auditorium as well as high-tech interactive kiosks that allow consumers to research films and purchase tickets.

Eighty-six percent of "last-month" moviegoers (an average of the four surveys), are aware of advertising seen before the movie. Forty percent of Americans age 12 and older went to the movies in the past month, during the holiday 2002 movie season. Cinema delivers advertising frequency, reaching an attentive core audience that is highly educated, active and is much more likely to have a household income of above \$75,000.

According to Scarborough Research, frequent moviegoers are significantly more likely to invest their money in high-end merchandise including automobiles, entertainment technology, and telecommunications than the national average.

- Moviegoers are 85 percent more likely to pay \$35,000 or more for a vehicle and 70 percent more likely to lease or buy a luxury vehicle.

- Entertainment and communication technology account for a large portion

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percent of global Internet access, followed by Europe with 24 percent, Asia-Pacific with 13 percent and Latin America with 2 percent.

The following analyses are based on the research of 10 countries, including Australia, Brazil, France, Germany, Hong Kong, Italy, the Netherlands, Spain, Sweden and the U.K.

The Internet has played an increasingly important role in all 10 countries during the past year. Globally, both the number of households and the number of people with access to the Internet via a home PC increased 12 percent since Q1 2002.

Of the 10 countries, Germany (37.1 million), the United Kingdom (29 million) and Italy (24.1 million) have the largest number of people with Internet access via a home PC. Combined, these three countries account for more than half (54 percent) of the total Internet audience for all 10 countries.

Sweden, Hong Kong, the Netherlands and Australia continue to be more mature Internet markets in



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Names of Note

Revlon, Inc., New York, has named **Stephanie Klein Peponis** to the newly created position of executive vice president, chief planning and business development officer. As part of her duties she will oversee market research and analysis.

London-based *Isis Research* has named **Don Marshall** vice president of advanced analytics at the firm's



Marshall **Chan**

office in Princeton, N.J. In addition, **Raymond W. Chan** has joined *Isis Research*, Maryland as an associate research director, with a focus on advanced analytics. And **Gareth Phillips** will move from the U.K. to Princeton to become the research director of *Isis*' second international ad hoc group.



Phillips **McCumber**

Delta Marketing Dynamics, East Syracuse, N.Y., has named **Jon McCumber** manager of analytics and quality control.

Duncan Southgate has rejoined *Millward Brown UK* as question-

naire consultant from *Millward Brown USA*, where he specialized in Internet research.

William D. Ratcliffe, president of *Millward Brown Goldfarb*, has been named president-elect of the Toronto Chapter of the American Marketing Association.

Raymond Pettit has been named vice president, strategic and analytic consulting, at *Momentum Research Group*, Citigate DVL Smith, New York.

Keith C. Stevens has joined *Target Research Group Inc.*, Nanuet, N.Y., as vice president of client services.

Jon Brancheau has been named vice president of marketing at *Saab Cars USA*. As part of his duties he will oversee market research and brand management.

The **Marketing Research Association (MRA)** has named **Larry Hadcock** its new executive director. **Betsy Peterson**, current MRA executive director, will retire at the end of November. **Hadcock** will begin work at the MRA in early August.

Consumer Opinion Services, Portland, Ore., has promoted **Jim Weaver** to vice president of Portland operations.

Two principals of *Cheskin*, a Redwood Shores, Calif., research firm, have been named to the Presidents' Circle of the National Academies. **Christopher Ireland**, chief executive officer of *Cheskin*, and her colleague **Davis Masten** have been invited to join this advi-

sory group, which helps promote public awareness of the work done by the National Academies. The National Academies comprise the National Academy of Sciences, the National Academy of Engineering, the Institute of Medicine, and the National Research Council. These private, nonprofit organizations provide science, technology and medical advice to the nation under an 1863 congressional charter.

Laura Livers has been named president and chief executive officer of Atlanta-based *Shop'n Chek Worldwide*.

Karl Feld has been named manager, call center services at *RTI International*, Raleigh-Durham, N.C.

Stephen Grundy has been named managing director of global business development and client service at the U.K. office of *Martin Hamblin GfK Global Healthcare*. **Angela Duffy** has been named managing director. **Peter Goldberg**, president of *Martin Hamblin GfK Inc.* in the U.S., has been named global research director for product development and commercialization. He will retain his role as president. **Allan Bowditch** remains global CEO healthcare.

Nancy Drapeau, market research manager at *Diversified Business Communications*, a Portland, Maine trade show organizer and publisher, was recently selected to join the Research Review Committee for the Center for Exhibition Industry Research, a U.S. exhibition industry research organization.

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FocusVision never takes short cuts by hooking into the focus facility's in-house video system. So, you'll never get a dark, behind-the-mirror picture, sky high camera position, or muffled sound. Focus facility A/V systems are fine for making video tapes, but they are not designed for the demands of video transmission.

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Free guide to HIPAA compliance

To assist health care providers in complying with the marketing portion of the Health Insurance Portability and Accountability Act's (HIPAA) Privacy Rule, Customer Potential Management (CPM) Marketing Group, Inc., Middleton, Wis., has developed a guide to HIPAA and health care communications.

While HIPAA affects almost every aspect of a hospital, health plan or other health care entity's operation, the marketing section has drawn comments, questions and complaints and was amended by the Bush administration last August. Despite the time to prepare, many organizations are still unclear about marketing definition exclusions and just what is permitted under the rule when it comes to communicating with patients.

Titled, "A Practical Guide to HIPAA and Healthcare Communications," the paper explains the marketing definition, exclusions, and provides examples of activities that require and do not require prior patient authorization before protected health information can be used for communication purposes. To download a copy go to the Press Room at www.cpm.com (registration required) or call 800-332-2631 or write to marketing@cpm.com.

Study follows prescription process

SureScripts, Alexandria, Va., has launched the Prescription Process Validation (PPV) program, which will study the roles, function and workflow of physicians, pharmacists and their respective staffs. The study, which began in May, will also examine key drivers of electronic prescribing adoption and the role that formulary management and drug utilization review play in the prescribing process.

Preliminary results will be reported during the National Association of Chain Drug Stores (NACDS) Pharmacy & Technology Conference in August. For more information visit www.surescripts.com.

Web site satisfaction tool from comScore

ComScore Networks Inc., Reston, Va., and ForeSee Results, Ann Arbor, Mich., have partnered to deliver a competitive intelligence capability for measuring customer satisfaction across competitive Web sites. The new tool combines the customer satisfaction methodology of ForeSee Results with the survey and continuous-measurement technology developed by comScore. Using the methodology of the American Customer Satisfaction Index (ACSI) used at the University of Michigan, ForeSee Results has developed a model that quantifies the elements that drive online customer satisfaction with links to future buyer behavior and the financial performance of a brand. ComScore and ForeSee Results' combined offering enables clients to extend the reach of the ForeSee Results methodology beyond the view of each client's own Web site and to create benchmarks among competitive Web sites on a site-specific basis. For more information visit www.comscore.com or www.foreseeresults.com.

New-product testing program from Directions Research

Directions Research, Inc., Cincinnati, has launched a proprietary new-product testing program called Navigator, which provides facts derived from an objective database to improve designs, interpretation and insight. Navigator is part of a partnership between Directions and the

University of Georgia's Masters in Market Research program to determine methods to "bridge" the results of more than 3,800 product tests into a coherent, validated body of knowledge.

Navigator's product testing database is designed to guide design questions and enhance product test results by providing a frame of reference derived from past experiences. This comparative data puts results into perspective and provides a context to determine the most sensitive and efficient testing process.

Navigator helps address considerations such as: the effects of branded vs. blind testing; methodologies to break ties; category effects on product ratings; issues of scale and measurement sensitivity; and reference points for blind product tests. For more information visit www.directionsresearch.com.

Research drives pharma success

Early market research investment, starting as early as the preclinical stage, drives long-term market preparation and competitiveness, according to a new study available from pharmaceutical intelligence firm Cutting Edge Information, Durham, N.C.

The industry average for market research budgets supporting a developing product hovers near \$7.1 million, and top-spending organizations dedicate more than \$26 million to their market research initiatives. Pre-launch spending, however, typically represents only 28 percent of overall market research investment. The study finds a sizable opportunity for pharmaceutical companies to invest more in early-stage market research to drive R&D and marketing — years before a product hits the market.

"Pre-Launch Pharmaceutical Market Research: Decision Support for New Product Development," available at www.pharmamarketresearch.com,

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With a full-time staff of engineers, project coordinators, account directors and a corps of in-field technicians, FocusVision has the service infrastructure for seamless, reliable implementation of projects around the world. Researchers can schedule FocusVision projects with complete peace of mind.

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News notes

A U.S. District Court judge has set a trial date of September 20, 2004 in **Information Resources, Inc.'s** (IRI) antitrust lawsuit against **A.C. Nielsen Co.**, **The Dun & Bradstreet Corp.**, and **IMS International, Inc.**, in which IRI is seeking damages in excess of \$1 billion after trebling. The jury trial in this case is scheduled to last between 10 and 16 weeks. In separate proceedings, the Canadian Competition Tribunal and the European Commission already have found that these same practices by ACNielsen were abusive and either prevented IRI from entering markets or artificially raised the costs of doing so, according to an IRI press release.

Acquisitions

On-Line Communications, Inc. has acquired a 100-seat contact center in Richmond, Va., from **Southeastern Institute of Research, Inc.** On-Line

Communications will retain the current staff and could ultimately employ up to 200 people.

Alliances/strategic partnerships

Cincinnati-based **MarketVision Research** has announced a partnering agreement with **iParenting Media**, an independent source for information on parenting and families. IParenting Media operates a collection of online and offline media assets focusing on the family through its entire lifecycle. The agreement combines MarketVision's research capabilities and Viewpoint Forum's Internet platform with iParenting's online community of 1.6 million users.

New York-based **WebSurveyEurope** and **Martin Hamblin GfK**, a U.K. health care marketing research firm, have signed a letter of intent under which Martin Hamblin GfK will have imme-

diated access to physicians in Europe and the United States for performing marketing research. Martin Hamblin GfK Global Healthcare will perform questionnaire design, data analysis and develop insights and recommendations for its clients, while WebSurveyEurope will field the studies and provide the data.

In a three-way transaction, **Kynetec**, a market information firm, has acquired the agricultural and animal health research and information business assets of **Promar International**, formerly trading as Produce Studies Research. At the same time, **Doane Marketing Research**, based in Cleveland and St. Louis, has acquired a minority interest in Kynetec, creating a new partnership capable of serving global market research and information management needs.

Irvine, Calif.-based software firm **Island Pacific** and **BIGresearch**, Worthington, Ohio, have formed an



Scarborough Research will hold its annual sales, research and marketing conference on August 12-15 at the Fairmont Miramar Hotel, Santa Monica, Calif. For more information visit www.scarborough.com/conferences/Shine/.

The European Society for Opinion and Marketing Research (ESOMAR) will hold its annual congress, themed "Management, Accountability, and Research - the Quest for the Objective Truth," on September 14-17 in Prague. For more information visit www.esomar.org.

The American Marketing Association will hold its annual marketing research conference on September 14-17 at the Century Plaza Hotel in Los Angeles. For more information visit www.marketing-power.com.

The Association for Survey Computing (ASC) will hold a conference titled "Survey and Statistical Computing IV - The Impact of Technology on the Survey Process" on September 17-19 at Warwick University in England. For more information visit www.asc.org.uk.

The Council of American Survey Research Organizations (CASRO) will hold its annual conference on October 1-3 at the Four Seasons Hotel in Toronto. For more information visit www.casro.org.

The European Society for Opinion and Marketing Research (ESOMAR) will hold a conference on responsible marketing, themed "Sustainability and Quality of Life - The Contribution of Research," in cooperation with the United Nations Environment Program on October 12-

14 in Berlin. For more information visit www.esomar.org.

The Qualitative Research Consultants Association will hold its annual conference on October 15-18 at the InterContinental Hotel in New Orleans. For more information visit www.qrca.org.

IIR will hold its annual market research event, examining best new practices and key trends impacting the industry, on October 20-23 at the Crowne Plaza Union Square Hotel, San Francisco. For more information visit www.iirusa.com.

The European Society for Opinion and Marketing Research (ESOMAR) will hold a conference on retailing/category management on October 26-28 in Dublin. For more information visit www.esomar.org.

alliance to provide clients with an end-to-end information solution to forecast consumer demand, better utilize assets, merchandise, and develop strategy and market position.

Survey Sampling International, Fairfield, Conn., is partnering with **Ciao AG** to provide access to a pan-European online consumer database.

Dallas-based wireless data collection firm **Mobile Memoir** has formed a partnership with Dallas-based **Common Knowledge Research Services**, which also has made a strategic investment in the company. Through the partnership, Mobile Memoir will develop and provide wireless survey and shopper panels based on a segment of Common Knowledge's Your2Cents online panel.

ACNielsen U.S. has signed **Stater Bros. Markets** to an information-sharing agreement. Sales data from the 156-store southern California supermarket chain will enhance the coverage of ACNielsen's Scantrack retail measurement service, and retailer-specific

insights from Stater Bros. will be available to manufacturer partners of the chain via ACNielsen's Account Level Services. The agreement makes ACNielsen Stater Bros.' preferred provider of syndicated sales information and merchandising software.

Research firm **TNS** has formed a partnership with **CNN** and *Time* magazine to provide consumer opinion-based research across 11 European countries. The research is designed to provide feedback on current affairs and world issues. The research findings will be featured in CNN programs and in regular news items in the European edition of *Time*.

Association/organization news

The **Marketing Research Association (MRA)** has named Larry Hadcock its new executive director. Betsy Peterson, current MRA executive director, will retire at the end of November. Hadcock will begin work at the MRA in early August.

William D. Ratcliffe, president of

Millward Brown Goldfarb, has been named president-elect of the **Toronto Chapter of the American Marketing Association**.

Leaders of market research associations from the Americas, Europe and Asia have decided to join efforts initiated by industry leaders during the RELEAS process aimed at strengthening the market research industry. RELEAS (Research Leaders Summit) was a two-year process initiated by **ESOMAR** and the **Advertising Research Foundation (ARF)** in which leaders of market research agencies worldwide and senior researchers working within major international companies decided upon a set of key activities aimed at ensuring that the market research industry will adequately respond to current and future challenges and opportunities. The RELEAS process was concluded in January 2003.

"The concerted industry action that has been decided upon at RELEAS will now include the active support of

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Qualitatively Speaking

Out of control

Managing focus groups within the client organization

By Karole Friemann

Editor's note: Karole Friemann is director of products and services for Market Research Project Management, Kimberling City, Mo. She can be reached at 417-739-1270 or at knfriemann@mchsi.com.

Clients compromise the effectiveness of focus groups more often than any other market research methodology. Here's why, and what can be done about it.

During the many years I spent directing market research staffs and projects on the client side, there was one phrase my business colleagues would use that would bring my professional instincts to a high-alert status: "We need to do some focus groups!"

Experience has taught me that most of the time "We need to do some focus groups" is more than a request. It is code, code for:

- "I just came from a meeting to get my idea/plan approved, and someone asked me to prove my customer assumptions [and I didn't have any proof]."

- "I know if we ask our customers, they will bear out my position."

- "I need results now, so I can get approval to carry out the plans I have already put in motion."

This situation usually presented several challenges:

- My colleague probably wasn't aware that focus groups might not be an appropriate methodology to address the information he/she was seeking. Asking him/her to take a moment to provide detailed information to determine the appropriate research methodology would probably be perceived as impeding progress.

- My colleague thought the research objective was clear: "Prove that customers like my idea/plan."

- If focus groups were an appropriate methodology, my colleague was probably going to observe the groups looking for those responses he/she wanted to hear, and lose perspective of how they related to responses from other participants — without recognizing his/her lack of objectivity. And colleagues opposed to the idea/plan would probably do the same. Precautions were necessary to keep my colleagues from taking action before market research professionals could

provide more thorough and objective interpretations.

- If focus groups were appropriate, my colleague was probably not aware of his/her responsibilities to the market research project, or the amount of effort it would take to fulfill them. (After all, to a non-researcher the effort required to get a bunch of people in a room and get the answer to the one question he/she wants to ask would seem minimal.)

Focus groups: the "pop research" of corporate America

Focus groups have mainstream appeal for businesspeople. They are easy to relate to, exciting to experience, and appear deceptively simple to interpret. And to businesspeople who need results yesterday, they offer almost instant gratification. It's no wonder that corporate market researchers are often approached by colleagues who say, "I need some focus groups," rather than, "I have some business issues I'd like to talk over with you. Can you tell me how

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Software Review

WebSurveyor and Surveywriter

A look at two choices in the crowded Web-based survey design field

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. For more information visit www.macer.com.

As the Internet matures as a means of collecting data, so too does the specialist software for Internet-based survey research. The two Web survey packages reviewed here — Surveywriter and WebSurveyor — are both aimed at professional researchers and provide support for a wide range of Web-based research activities, but they both go about it in radically different ways.

WebSurveyor: a serious research tool with a friendly face

WebSurveyor consists of a locally-

installed PC-based survey client that integrates with WebSurveyor's hosted services on the Internet when it needs to. This means you do not need to be online the whole time you are creating a survey or analyzing the results, and all of the menu items and options work at the speed of a normal desktop application.

A workflow menu of activities is constantly visible to the left of the main work area, which makes it very easy to find your way around the program. A dozen different activities are grouped into three sections representing the three stages of a research project, from writing the questions to fielding the study (in this case called "publishing it," which is more like switching it on) and analyzing the results, where the program provides some very rudimentary analysis capa-

bilities.

Click on any option on the left and the main window changes to a form where you specify the options for that activity, giving it a Web-like feel, though it is very much a desktop program. A particularly strong feature of the program is the library of pre-defined surveys.

As delivered, it is much more likely to appeal to those working for organizations suddenly handed the responsibility for doing a survey rather than professional researchers. Nonetheless, the library can be developed to add your own particular questions or types of surveys.

There is a parallel feature for defining standard sets of answers, called "response templates," so you should never have to type "strongly agree" or "18-24" again. This has another benefit, in that it allows you to manage common lists of answers over time. A new brand added to a list of brands will replicate across all questions using that list; it is a feature many survey programs could do with.

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WebSurveyor (www.websurveyor.com)

Pros

- simple, easy, intuitive survey design tool
- effortless survey publishing and custom invitation sending
- a good range of advanced features tucked away
- excellent templating and library capabilities

Cons

- very limited analysis
- language translations tedious to enter
- no quotas
- limited custom programming capabilities



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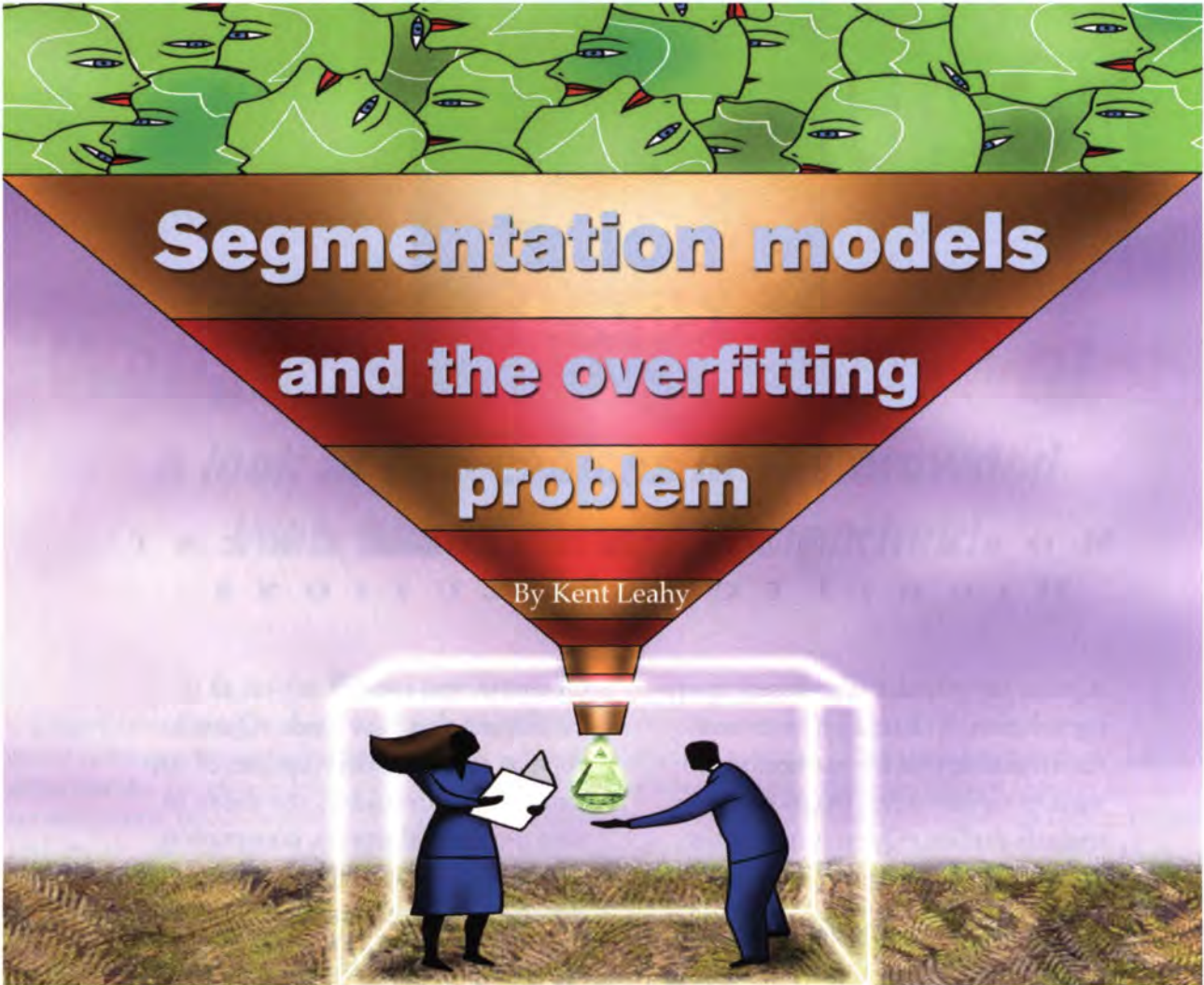
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By Kent Leahy

Editor's note: Kent Leahy is vice president of TMI Associates, Inc., a North Caldwell, N.J., research firm. He can be reached at 718-392-8217 or at kentjleahy@aol.com.

Predictive segmentation modeling techniques vary in regard to the size of the sample needed to achieve a given level of reliability. This is due to the fact that some methods have a greater propensity to capitalize on chance or “overfit” the sample data on which the model is derived. A model that overfits the data gives attention to elements in the sample that not only represent the systematic variation inherent in the population, but also to sampling error. When this happens the result is a model that can fare less well, and sometimes dramatically so, when applied to a new sample or a different set of data.

The goal of model building is to obtain a predictive model that generalizes across many such samples to the universe at large, and not merely to the sample at hand. We want our model to be as effective as possible when we use it on

future data, and not just on the sample on which it was based.

To accomplish this goal, we need to develop our model so that it captures innate systematic processes rather than discrete, temporal events, or those that are sample-specific or peculiar to a given sample. We thus need to restrain our model from fitting the sample too well. Prediction methods such as neural networks, classification trees, rough-sets, and those based upon fractal geometry or chaos theory, are all examples of predictive techniques that have a tendency toward sample-dependence or overfitting. Standard statistical methods such as classical regression analysis, logistic regression (logit), and discriminant analysis, on the other hand, are less susceptible to the overfitting problem and thus tend to be more reliable.

The reason for this is that these latter or parametric methods explicitly specify on an *a priori* basis the assumed functional form of the relationship between the dependent variable and the respective predictors. In statistical terminology,

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A stylized, colorful illustration of a person wearing glasses and a blue suit, sitting at a desk and using a laptop. The person's face is partially visible on the right side. The laptop screen shows a globe. Several red arrows point from the laptop towards various green and blue documents or folders scattered around it. The background is a warm orange and yellow gradient.

Persuasive e-mail invitations

By Bill MacElroy

Editor's note: Bill MacElroy is president of San Francisco-based Socratic Technologies, Inc. and is president of the Interactive Marketing Research Organization (IMRO). He can be reached at bill.macelroy@sotech.com or at 800-5-Socratic.

One of the most eagerly debated topics at IMRO (Interactive Marketing Research Organization) conference breakout sessions has been the role of the initial e-mail invitation in gaining participant cooperation for Web-based surveys. A wide variety of opinion has emerged as to what constitutes best practices for writing the perfect e-mail. On one side of the debate are those researchers who feel that a strong appeal to respondents' desire to get paid is a winning strategy. Others feel that the most successful approach is to the potential participant's interest in giving his or her opinion.

After much trial and error and some experimental research, I have come to the conclusion that the decision to participate is based on a complex interplay of motivations that must be addressed. The tricky part is that not all people react positively to the same messages. Therefore, the secret appears to be to communicate a number of details very quickly, hoping to hit on at least one of the key elements that will act as the definitive persuader.

This article will go through 10 of the issues that we feel must be addressed in an e-mail invitation to a Web survey and the order of precedence that these points-of-information need to be presented. The order of presentation is important, because several usability studies have shown that the average time that someone spends reviewing an e-mail to determine whether it is worthy of attention is about three seconds.

Step 1: Don't look like spam

Of course it should go without saying that your e-mails

10 steps to greater Web survey response rates

should not BE unsolicited spam (e-mails sent in bulk to people with whom you or your client has no ongoing business relationship). However, even if you have contact permission, the No. 1 reason that people do not respond to e-mail invitations to Web surveys is that the invitation is mistaken for spam.

What are some of the ways you can avoid the appearance of being junk e-mail? For one, use text, not HTML. The HTML e-mail format, with fancy graphics (and long load times) has become so closely associated with spam that any benefits from "looking nice" are lost. Second, use the full, correct e-mail address for each invitation sent. Do NOT use a populated BCC field or bulk mailing options.

Familiarity with the sender is a prime influencer of the decision to participate. Send invitations from a domain that will be recognized by the recipient. Researchers should avoid sending e-mails from domain names with elements known to cause spam filters to prevent their delivery. Some spam filters look for domain names with key words such as: offer, free, cash, blast, private, bar-

gain, discounts, daily, deals, promo, win/winner, shop, dollars, lotto, marketing, rewards, wholesale, unique, thrifty, value, direct, buy and many other “salesy” come-ons.

Step 2: Three critical subject line components: sponsor, topic and survey

Dealing with a known and trusted source is also a major factor in getting an e-mail survey invitation opened. Several industry association and academic studies indicate that the sponsor of the survey and the general topic of the area of inquiry are very important considerations in the critical three-second window for the recipient’s decision as to whether or not to open the e-mail and review it.

From personal experience, I have found that adding the word “survey” helps to amplify the fact that this is research, not an errant spam message. This is somewhat controversial, in that some IMRO members prefer “market research.” But from follow-up survey satisfaction questions, however, I find that “survey” sounds less burdensome than “research” and that anything with the term “marketing” in it tends to be a mental filter leading to

deletion.

Step 3: First sentence

As mentioned earlier, once someone opens an e-mail invitation, we have between only two and five seconds of reading time to get the person’s decision whether or not to participate. Research on phone-based studies suggests that a live interviewer has slightly longer, perhaps five to seven seconds to reach the same decision. Online, this translates to about one sentence’s worth of content.

The ultimate question then becomes: what message to send within those critical seconds? Our recommendation is to overtly distance the research from direct marketing and/or a sales pitch. Here is one variation of that message that appears to work well:

“This invitation is to take part in a survey project and is not a sales solicitation.”

Step 4: Salience points

Many scholars have studied the factors that influence people to open mail survey envelopes. Some of those findings can also be applied directly to e-mail invitations. In essence, there appear to be four

issues that account for the majority of the process of deciding to participate. We have come to refer to these as salience drivers, in that they influence the degree to which people feel the research is salient or relevant to them personally.

In order to communicate all of these key points quickly and effectively, we recommend a bullet-pointed list of all four salience drivers:

- What are we researching?
- How much are we offering for your time?
- Who is the sponsor (or affiliated industry)?
- How much time/effort will this take? (Note: Be truthful!)

Step 5: Recognition of non-qualified terminates

If your sampling strategy calls for the screening of individuals for demographic or other characteristics, we highly recommend giving an indication of what will happen if the person doesn’t qualify. We have found that people who terminate without recognition of their efforts report feeling disrespected and are less likely to participate in future research.

Even an entry into a small drawing is usually enough to say thank you and express an appreciation for their effort. We have used the following verbiage with success:

“If you do not qualify to participate in the entire survey, you will still be entered into a drawing to win \$xxx just for trying.”

Step 6: Contact for help or more information

Today’s respondents are faced with an avalanche of spam daily. This creates anxiety about the legitimacy of a research request. In part because of all the spam come-ons barking that you can “make up to \$50 an hour for your opinions,” respondents do not trust third-party online researchers as much as they used to. Therefore, we have seen an increasing need to provide a “con-

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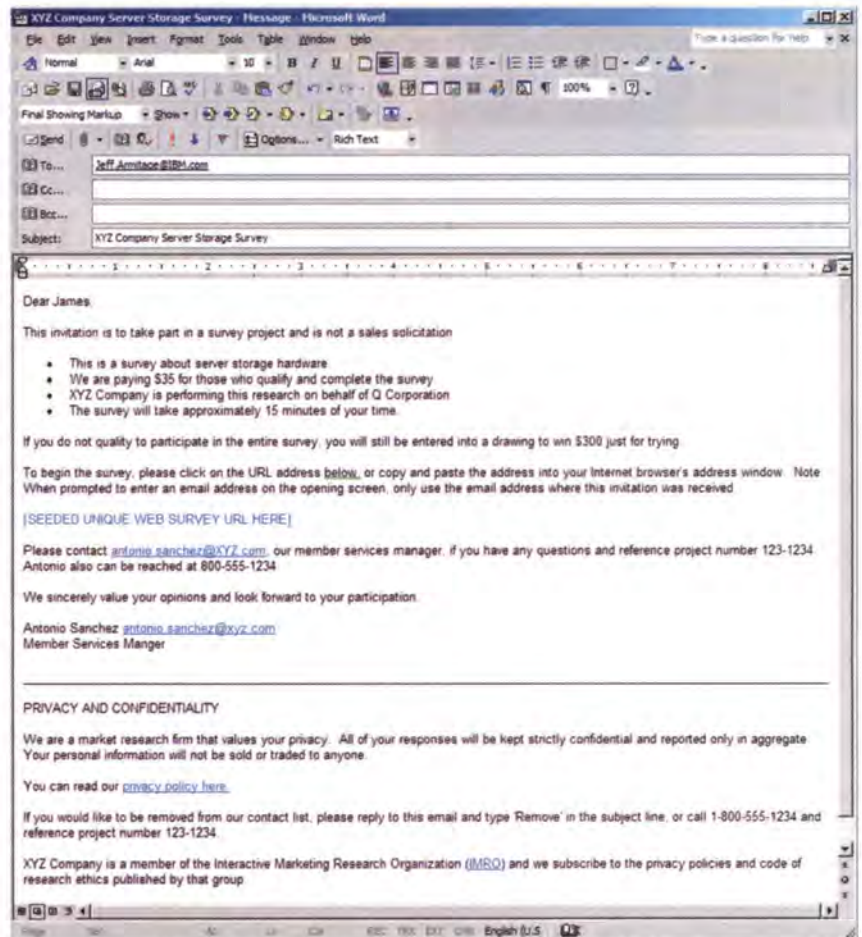
tactable” human being live or online, who can assure potential participants that the study is authorized and legitimate.

For this reason, we strongly recommend an e-mail address for online contact and a toll-free number for “questions you may have” about the study. Some effective wording might be as follows:

“Please contact antonio.sanchez@XYZ.com, our member services manager, if you have any questions and reference project number 123-1234. Antonio also can be reached at 800-555-1234.”

Step 7: Privacy policy/confidentiality statement

A very strong, clearly-worded statement regarding the researcher’s respect for privacy and confidentiality is crucial for people not intimately familiar with the research organization. Privacy concerns center primarily around two questions: Are you going to sell my telephone number? and Are you going to sell my e-mail address? Confidentiality concerns are also expressed by two pervasive fears: Who is going to see my answers? and Will I be confronted by someone if my reactions are negative or be direct-marketed to based on the information provided?



Usability studies show that the average time spent reviewing an e-mail to determine if it's worth reading is about three seconds. A survey invitation like the one shown here gives you the best chance to earn the respondent's time and attention.

A clear and unambiguous statement that we recommend is as follows:

“We are a market research firm


that values your privacy. All of your responses will be kept strictly confidential and reported only in aggregate. Your personal information will not be sold or traded to anyone.”

Step 8: Privacy policy link

Over time, more and more people are checking formal corporate privacy policies prior to entering any type of personally identifiable information. These policies need to be much more detailed and specific than the simple statement shown in Step 7. A link to the broader policy should appear in your e-mail invitation.

If you have not published a Web-based, formal privacy policy, there are numerous sources for templates and definitions. Some examples can be found at the following sites:

- IMRO (www.imro.org)
- AMA (www.marketingpower.com)



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Step 9: Opt-out e-mail address and toll-free number

Increasingly, state laws are requiring a free opt-out mechanism for removal from lists. Fourteen states now require a toll-free number in addition to an e-mail reply system; in some cases a \$5,000 per-incident fine for not providing this information is levied.

A second, private regulatory system, incorporating spam filters or black hole lists, checks to see if opt-out e-mail and telephone numbers are working if complaints arise. Although this is just one point on a checklist to identify chronic spammers, domains that do not comply with working e-mails and telephone numbers can be blocked at the ISP levels for multiple e-mail delivery systems.

A statement that provides the required information, and that allows you to track problems with specific sample sources, reads as follows:

“If you would like to be removed from our contact list, please reply to this e-mail and type ‘Remove’ in the subject line, or call 1-800-555-1234 and reference project number 123-1234.”

Step 10: Industry affiliations and ethics standards

A great deal of comfort is lent from association with a national or international industry group with a broader mission for ethical standards and the enforcement of those standards. If your company or department is a member of such an industry association, we recommend that you publish the following:

- The name of the organization (with a hyperlink) in your text-based e-mail invitation, and
- The association logo both on your privacy page and on the first page of your Web survey.

Note: If you use a hyperlink within your live survey to your industry


group, be sure it opens the link in a new window.

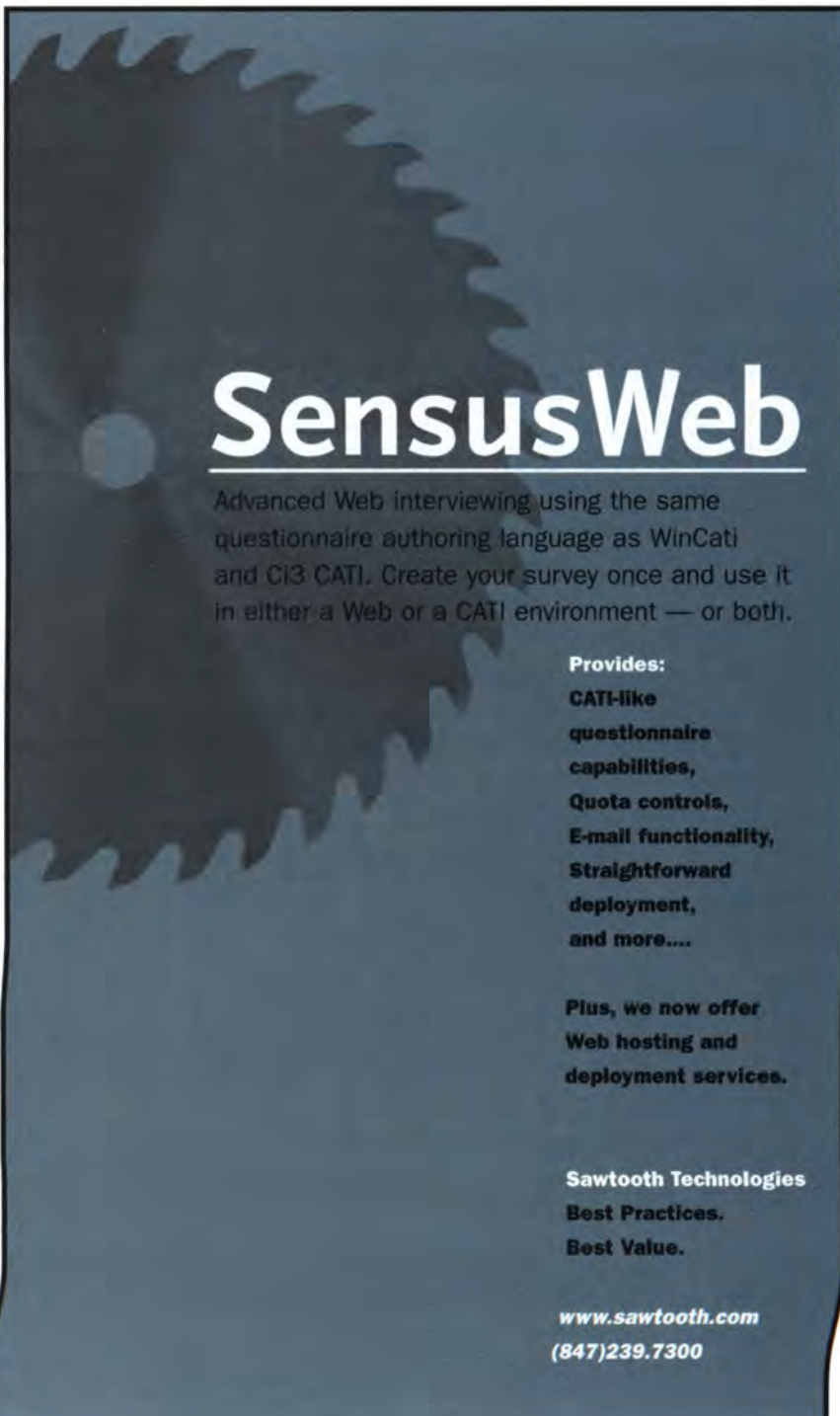
As an example, in order to highlight the association with an industry group, we recommend the following wording, with a highlighted link, within your e-mail invitation:

“XYZ Company is a member of the Interactive Marketing Research Organization (IMRO) and we subscribe to the privacy policies and

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Simple steps

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Study shows impact of online survey length on research findings

Editor's note: Allen Hogg and Jeff Miller are, respectively, director of marketing and senior vice president of Burke Interactive, the online research and reporting support organization at Cincinnati-based Burke, Inc. They can be reached at allen.hogg@burke.com and jeff.miller@burke.com.

It is common knowledge in the research industry that the percentage of respondents dropping out of Web surveys will rise as questionnaires lengthen. It is less known how such mid-survey terminations affect study findings.

Recent experiments conducted by Burke, Inc. and SPSS MR show that questionnaire dropouts can indeed impact results — particularly on concept tests, the most common use of Web surveys.

Respondents indicating they were relatively uninterested in an interactive television concept described in a recent survey were far more likely to drop out of a long version of a questionnaire about that concept than were relatively uninterested respondents taking a shorter version of the survey.

The effect of this higher dropout rate is to inflate concept interest scores. Scores among those completing the long survey version were

Watch
out for

dropouts

By Allen Hogg
and Jeff Miller

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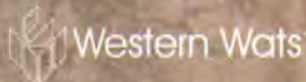
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significantly higher than they would have been if those who dropped out of the survey were also included in the findings.

In a parallel experiment with a customer loyalty survey, the pattern was not so pronounced, but there was at least directional information suggesting those less satisfied with their experiences at selected restaurant chains were more willing than other respondents to continue to the end of a long version of the survey. The findings certainly again demonstrated how results could vary depending upon whether those who dropped out were included or not.

Experiments

The experiments took place in March 2003 using respondents recruited to AOL's OpinionPlace Web site. OpinionPlace respondents, who are distributed to research studies by SPSS MR, are asked to indicate how much time they have available for surveys and offered variable incentives — AOL credit or American Airlines frequent flier miles — based upon the length of the study to which they are assigned.

For both the concept test and customer loyalty survey experiments, respondents were assigned to one of three cells. The first cell for each experiment consisted of respondents who indicated having the minimum amount of time — 15 minutes — to complete a survey and were assigned to take a shorter version of either the concept test or customer loyalty questionnaire. These shorter questionnaires took people, on average, six to eight minutes to complete. Those who completed the survey received a \$2.25 credit or 150 American Airlines frequent flier miles.

The second cell for each experiment consisted of respondents who

also indicated having 15 minutes to complete a survey. These respondents, however, were assigned to complete longer questionnaires designed to take up all of those allotted 15 minutes. (In fact, these surveys actually turned out to take respondents, on average, almost 19 minutes to complete.) Respondents in this cell who completed their surveys also received a \$2.25 credit or 150 miles.

A third cell for each experiment also consisted of respondents assigned to take the longer survey versions. These people, however, had indicated that they would have up to 30 minutes to complete the survey — and were also given a more substantial incentive, a \$4.50 credit or 300 miles, for finishing the task.

Between 193 and 214 completed surveys were obtained for each cell of each experiment. For the concept test, in addition to indicating interest in the interactive television service described in an initial statement, respondents assigned to take the longer survey version were asked to rate their interest in more than 50 specific possible features of the service and propose prices for different levels of service. For the customer loyalty study, respondents assigned to the longer survey version were asked to rate the importance of 45 specific restaurant attributes, as well as how well two different chains performed on those attributes, plus some additional questions about dining habits not asked of those taking the shorter survey version.

Concept test results

As expected, the longer version of the concept test did have a higher mid-survey termination rate (23 percent) than the shorter version (13 percent) did. The termination rate was

Table 1

Dropout Rate Among Those:	Shorter Version	Longer Version
Extremely or Very Interested in the Concept	10%	13%
Somewhat Interested in the Concept	11%	18%
Not Very or Not At All Interested in the Concept	11%	30%

particularly high (29 percent) for those who were assigned to take the longer survey version, but indicated they had only 15 minutes to complete the study and received the lower incentive. Among those who indicated they had 30 minutes and received the larger incentive, the dropout rate was 16 percent.

Table 1 shows that, for the longer version of the survey, the dropout rate was not consistent across concept interest levels. Those less interested in the concept were much more likely to terminate the questionnaire. Three out of 10 people taking the longer survey version who indicated they were not very or not at all interested in the interactive television concept dropped out, compared with just 18 percent of those who were somewhat interested and only 13 percent of respondents who were extremely or very interested.

By contrast, dropout levels for the shorter survey version were fairly consistent across interest levels, suggesting that, for concept tests of less

than eight minutes in length, it is something other than a lack of interest in the survey topic that prompts people to drop out.

The effect the varying dropout rates can have on survey findings becomes clear when one examines results among those who were assigned to the longer survey version, but only promised the smaller incentive for completing it. Among those in this cell who did complete the survey, 22 percent indicated that they were extremely or very interested in the concept, and just 13 percent indicated that they were not at all interested. Among those in this cell who did not complete the survey, only 13 percent indicated being extremely or very interested in the concept, and 28 percent indicated being not at all interested.

The common top-two-box measure of interest in a concept is therefore inflated because the long survey prompts less interested respondents to drop out. On the flip side, bottom-box rejection of the concept is under-

estimated if only those completing the survey are counted.

Although dropout rates can be reduced if the survey population is restricted to those willing to take longer surveys in return for greater incentives, it should be noted that changing the population in this way will also affect results. Among respondents who were willing to take a 30-minute survey and completed the questionnaire, 39 percent indicated being extremely or very interested in the interactive television concept, while just 8 percent indicated being not at all interested. It appears that people willing to spend more time on a survey might be more disposed to give more positive responses.

Customer loyalty study results

For the customer loyalty study, the contrast in termination rates was even greater than it was for the concept test. Only 6 percent of respondents assigned to the shorter version of the survey did not complete it, while 28 percent of those assigned to the



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Table 2

Dropout Rate Among Those:	Shorter Version	Longer Version
"Very Satisfied" With a Restaurant Chain	3%	26%
"Somewhat Satisfied" With a Restaurant Chain	6%	23%
"Somewhat Dissatisfied" or "Very Dissatisfied" With a Restaurant Chain	4%*	18%
*Low base size (n=26)		

longer survey version dropped out. Among those who indicated having only 15 minutes to spend on a survey, 37 percent dropped out, while the dropout rate was 17 percent among those willing to spend a half hour.

Examining the issue of whether dropout rates varied by satisfaction levels produced limited evidence. Table 2 suggests that, for the longer survey, people less satisfied with their restaurant experiences were perhaps somewhat more inclined to complete the survey (although the differences were not statistically significant).

It should be noted that, to qualify for the customer loyalty study, respondents had to indicate that they had eaten at two or more of 10 of the most common casual dining chains in the United States (Applebee's, Bennigan's, Chili's, Hooters, Lone Star Steakhouse & Saloon, Red Lobster, Ruby Tuesday, Olive Garden, Outback Steakhouse, and T.G.I. Friday's). The restaurants they

were asked to rate were selected at random from among all those they said they had eaten at, with a preference given to three restaurants to

Table 3

Percent indicating they were "very satisfied":	Survey Completers	Survey Non-Completers	Completers and Non-Completers
Raters of "Apple-Chili Garden"	51%	65%	55%
Raters of "Lone Redback"	49%	47%	48%
Raters of "Ben & Ruby Friday's"	38%	53%	43%

ensure there would be enough ratings of particular restaurant chains to make comparisons while holding the chain rated constant.

So we aren't seen as spreading good or bad news about any particular restaurant chain, we will call the restaurants given preference in selection "Apple-Chili Garden," "Lone Redback," and "Ben and Ruby Friday's." Looking again at the satisfaction question, Table 3 demon-

strates how responses can again differ depending upon whether those not completing the survey are included in the findings. (Findings here are limited to those who agreed to spend just 15 minutes on a survey and were assigned to the longer survey version.)

Although the pattern was not consistent for the three restaurant chains, the data certainly shows that the decision whether to include non-completers in the results could impact perceptions of the relative perfor-

mance of the three restaurants. Focusing on results based only upon opinions of those who completed the surveys would make it appear that the percent "very satisfied" with Apple-Chili Garden and Lone Redback is quite similar, with both doing substantially better than Ben & Ruby Friday's on this measure. Adding in findings from survey non-completers, however, widens the gap between Apple-Chili Garden and Lone Redback substantially, and in fact makes Lone Redback scores closer to those obtained by Ben & Ruby Friday's.

Just as in the concept test, respondents willing to spend more time on the study again tended to provide more positive ratings. Across all restaurants rated, 54 percent of satisfaction ratings given by those who completed the longer customer loyalty survey and indicated being willing to spend a half hour on it were "very satisfied," while only 47 percent of satisfaction ratings given by those who completed the longer survey but only indicated having 15 minutes fell in this category.

Implications

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because respondents dropped out of surveys can be seen as an extension of the common problem of non-response error. Non-response error occurs when those who do not respond to survey invitations might be different in important ways from those who do. (This can be a particular problem when survey invitations tell too much of what a study is about.) Similarly, those who do not complete surveys can be different in important ways from those who do finish.

Although some evidence of this effect was seen in the customer loyalty experiment, it might be an especially likely happening in the concept testing arena. Because people who drop out of these surveys tend to be less interested in the concept being tested than individuals who do not, reporting findings based only on the opinions of those who complete the survey would tend to result in biased, inflated estimates of concept interest. As Web studies lengthen, they would seem to be more prone to this bias.

The outcomes of these experiments therefore reinforce the notion that efforts should be made to minimize mid-survey termination rates by keeping Web questionnaires short. It is, of course, a bad idea to put extra, unnecessary questions in any sort of survey, no matter what the data collection method. The temptation to add extra questions on the Web can be great, however, given that there often seems to be very little incremental cost incurred for doing so. In fact, the cost can be huge — causing the entire set of study findings to result in questionable estimates.

If studies cannot be kept short, researchers might get more reliable estimates of the opinions of a population by including in findings survey responses offered by those who terminated the questionnaire, as well as those who completed it. Such an action would, of course, go against years of marketing research tradition and could make compiling and reporting study results a more diffi-

cult and confusing process.

Researchers could also work to circumvent the issue by adopting standard surveys for concept testing purposes. Because concept test results are often compared to survey scores received by products previously introduced to the marketplace, the relative appeal of a particular concept is often more indicative of its likely marketplace success than the absolute numbers resulting from the survey. If standard concept tests are used, bias caused by survey termination would likely still exist, but it might be fairly consistent across sets of studies of concepts of similar appeal.

One thing survey researchers should not do is ignore this issue. As Web surveys lengthen, dropout rates will increase. If results are compiled based only on respondents who complete the questionnaires, findings likely will be affected. Researchers should not let their desire to ask more questions lead them down a path to biased data. *TE*

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Best practices for online research

**Proven methods for
reliable results**

By Lee Smith

Editor's note: Lee Smith is president of InsightExpress, a Stamford, Conn., research company. He can be reached at lsmith@insightexpress.com or at 203-359-4174.

While online research is faster and easier to implement than its traditional counterparts, that doesn't mean that it's as easy as it looks. Without understanding the best practices of surveying using this powerful medium, you can fall into making some all-too-common mistakes and pitfalls.

In many ways, the methodologies for conducting online research are very similar to those employed for traditional

research. Objectives must be defined (for example, consider the characteristics of your audience); surveys must be designed to encourage participation; and careful thought must be given to achieving meaningful results. Additionally, because of its nature, the online environment requires other factors be considered before the survey is pushed to respondents. This article outlines five of the most important factors for conducting online research. Keep them in mind and you're almost certain to generate stellar online results.

1. Define objectives — what do you want to know?

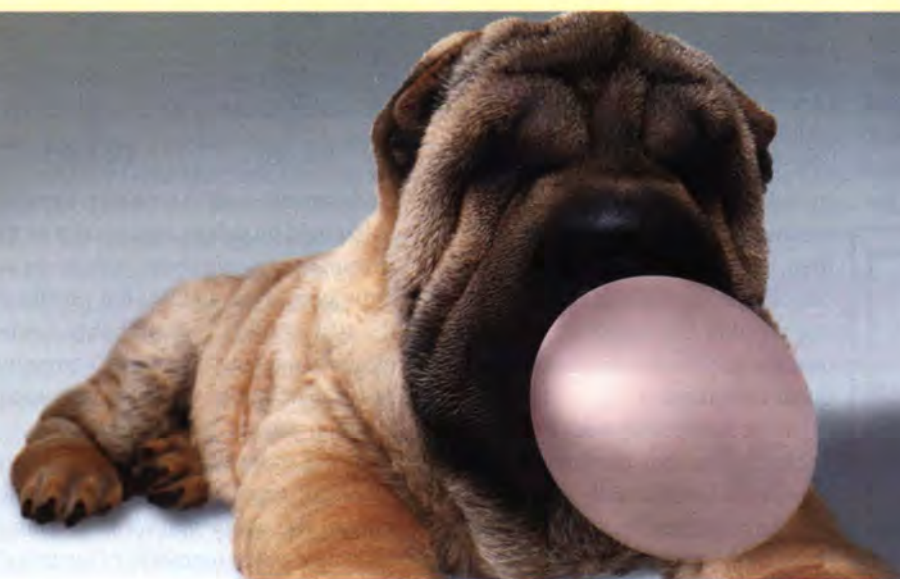
Defining what questions you are addressing in your research is a critical component in developing the foundation for a well-designed online survey.

The objective of any survey is to gather the information needed to make a sound decision. Typical questions include:

- What problem needs to be solved?
- What decision(s) are needed to solve that problem?
- What kind of information is needed to make the decision(s)?
- Who can provide that information?

Once these questions are answered, it is easier to come up with a clear, concise statement mapping out the objective of

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the survey. If the survey has more than one objective, multiple surveys may be a better course of action than asking too much in one survey.

For example, an individual in charge of developing a marketing plan for the coming year for a national restaurant chain could use online research to shape the plan. The marketing director can find out what the restaurant's customers think of its food, service, atmosphere, menu choices and prices. What's more, the

marketing director would know if those opinions vary significantly according to a number of key demographic variables,

pletion rates, make it feasible to migrate a variety of research applications from traditional methodologies to the online

Example Criteria	1996 Online Population	2001 Online Population*	U.S. Population (2000 Census)
Male	62%	49%	49%
Female	38	51	51
Marital Status: Married	59	53	53
Adults 18-49	88	76	63
Adults 50+	12	24	37
Household Income	\$62,700	\$49,000	\$40,816**

including age, gender, education level, income, marital status, presence of children, and/or geographic location. Other considerations might include determining whether the opinions of frequent customers differ from those of infrequent customers.

Before proceeding with a survey, it's important for that marketer to review objectives. Does it really make sense to talk only to customers of his or her restaurant (at least right now)? After all, feedback from customers is important, but for comparison reasons, it's important to hear from people who frequent competing restaurants. Also, how would the marketer know where his restaurant stands if, for instance, customers say his restaurant lacks enough menu choices?

By casting a broader net and conducting the first survey with a less-targeted audience (adults, ages 18-55, for example), the marketer is able to set some benchmarks for customer satisfaction with comparable restaurants — simply by asking a couple of questions about which restaurants the respondents frequent. Following up with a second survey designed to get more specific input from their own customers, exclusively, is the logical next step. One of the benefits of conducting this type of research online is that the lower overall cost of surveying means marketers can afford to conduct more research with less overall expense.

2. Identify targets — look who's online now

Nearly two-thirds of all households are online today — meaning that the profile of the average adult American Internet user is rapidly converging with that of the average American (see chart).

These fundamental demographic shifts, in combination with higher respondent cooperation and survey com-

pletion rates, make it feasible to migrate a variety of research applications from traditional methodologies to the online

environment — with impressive results. It would be safe to assume that in the restaurant example above, where restaurant-goers were sought, the profile of the typical Web user probably comes closer to meeting the survey's targeting needs than that of the U.S. adult population in general.

In fact, more and more people, in virtually all types of demographic categories, are using the Web, making it more likely that members of a survey's target audience will be available online. Still, it's important to give thought to defining the audience and how to approach them, especially when members of low-incidence populations are sought.

It is also possible to take advantage of an online survey to address issues that respondents might not agree to discuss in a phone or face-to-face interview. For example, recent studies have indicated that people are more willing to answer questions on sensitive issues on the Web than they are in phone interviews. Online research respondents also appear to be more willing to answer open-ended questions than those responding to mail or telephone interviews. Once a baseline is established about the potential survey audience, questions can be developed.

3. Designing the perfect survey — it all depends on how you ask

On the face of it, conducting survey research can seem tantalizingly simple. Ask some questions, get some answers, add it all up and find out what everyone thinks. But it's not quite that simple. In fact, how a survey is designed may be the single most important factor in determining both response rates and the reliability of what is learned from the responses. Some of the rules of good survey design apply to all forms of research, whether the study is conduct-



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ed in person, via mail, over the phone or on the Internet. And then there are other considerations that are specific to the Web.

Ideally, how long should a survey be? As short as possible. That reliable piece of survey design advice is especially valuable when it comes to Web surveys. The Web, after all, is the ultimate medium for instant gratification. Users go online, get what they are looking for, and get going. It's been perfectly tailored for people who are always on the run. Therefore, surveys should be designed for that same mentality.

Of course, as in any situation, there are a few exceptions to consider. If, for example, the survey is targeting a group of people who have a vested interest in the outcome of the research (i.e., employees, members of an organization or customers who've made a major long-term investment in a particular product or service), more questions can be asked without the same kinds of concern for response rates or bias. Or if the potential respondents are members of a panel who have agreed in advance to answer questionnaires of a given length, higher levels of cooperation can be expected.

Once the survey length is established, the question order must be set. Tempting as it may be to start with demographic questions and save the "good stuff" for last, it is not advisable to do so. Research has repeatedly shown that people are more likely to complete a survey — and provide honest answers — if they can get right down to business and start answering questions related to what the survey is about at the very beginning. The first question should be the one that captures the respondent's interest, is easy to understand and easy to answer. Save the drop-down boxes and multiple-answer grids for later.

Experienced researchers know that there is almost always more than one way to ask a question. The best online survey questions are the ones that are the shortest, simplest and most direct. For example, if you wanted to assess customer satisfaction for the restaurant chain from the example above, don't ask, "How was your last meal at the chain restaurant?" A question like that

answers — "fine," "good," "great," but would not provide any valuable information.

Rather, construct a series of questions that allow for specific feedback about everything from the food and the prices to the service and the atmosphere. Here are a few tips that can ensure the right questions are asked:

- Ask one thing at a time. Surveys can be confusing if they ask questions like, "Did the food and service at Joe's Place

meet your expectations?" Instead, break that into "Did the service meet your expectations?" and "Did the food meet your expectations?"

- Watch out for bias. It can be very easy to telegraph the "right" answers to some questions. For example, by asking, "Given the near-drought conditions facing many cities today, do you think that Joe's Place should continue its policy of serving each customer a glass of water automatically?" it is likely the response

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would be the same for nearly all respondents. After all, who wants to advocate wasting water?

- Avoid loaded questions. Be careful to present all sides of an issue when asking for an opinion. “Should Joe’s Place offer a separate children’s menu, or are there enough choices for children on the current menu?” doesn’t give respondents an opportunity to consider other options when it comes to ordering for their children. A better idea might be to ask “Which of the following do you think would help meet the needs of families with children eating at Joe’s Place?” and follow it with a list of several options (including a children’s menu, offering half-portions, etc.) along with directions to select all that apply.

The quality of the questions asked will have an impact on the quality of the answers received.

4. Invitations, incentives and driving the survey home

Most market researchers don’t consider themselves to be salespeople. In fact, the market research community has gone to great lengths to distance research from sales — for obvious reasons.

But the truth is, market researchers do have to sell. Because no matter how well objectives have been defined, how precisely audiences have been targeted, and how adeptly the questionnaire has been constructed, the survey will be meaningless if people do not respond. That requires selling.

Recent years have seen a decline in response rates for most traditional survey methodologies — thanks in part to the proliferation of answering machines, Caller-ID systems, heavy telemarketing and direct mail campaigning. The American public has been telling researchers that they will not be bothered.

Online researchers, however, face a different set of challenges. The same factors that can make soliciting respondents for online survey less intrusive — and therefore, more readily welcomed — can also make the invitations easy to ignore. So it’s important to give careful consideration to both the medium and the message.

Among the most popular methods for inviting people to participate in a survey:

- E-mail — This is clearly the way to go when the audience is well defined, and when there is an available list of e-mail addresses and permission to send them e-mail. Lists can be purchased with qualified names or companies can use lists from their own databases of customers, prospects, Web site visitors, members, employees and other contacts.

- Web site banners, buttons and other links — The obvious choice if the desire is to receive feedback from visitors to a specific site. It is also the best way to recruit for low-incidence populations by issuing an invitation on Web sites that are known to draw an audience similar to the one the survey is trying to reach.

- Pop-up surveys — These are just like the surprise ads that pop up when users visit Web sites, and can be annoying to potential respondents. Pop-ups should be used judiciously, and only on sites that are very strongly related to the content of the survey.

Whichever method is chosen, it is important to make the most of that fleeting opportunity to capture a respondent’s attention and get him or her to say yes to participate in it. Be sure to communicate, right up front, why taking five or 10 minutes out of an already busy day to answer survey questions is a worthwhile exercise. Some generic starting points:

- “We’d like to know what you look for in a family restaurant, so we can provide you with the best possible food, service and value.”

- “With your input, we’ll be able to offer you more of what you’re looking for — in terms of products, service and value.”

- “Your opinion is important to us because...”

Then be as specific as possible. For those creating an e-mail invitation, be as personal as possible, such as mentioning the recipient’s name, any information about recent transactions, and acknowledging any past correspondence. The more that is done to emphasize a known relationship with the recipient, the better the chance that he or she will agree to participate in the survey.

To incent or not to incent — now that is a question! Market researchers have been offering potential respondents incentives for as long as anyone can remember. Years ago, it was a shiny new

quarter tucked inside a mail survey with the benevolent suggestion that the recipient give it to a deserving child. Today it can be anything from cash to merchandise, services, discounts and even donations to charitable organizations. Whatever such compensation is called, it is important to note that it is simply another means of answering the respondent’s “What’s in it for me?” The key, of course, is offering an incentive that’s attractive enough to boost response, without it being so spectacular that results are biased because the sample was skewed.

Many researchers refuse to offer incentives at all — citing potential bias (which is nearly impossible to estimate accurately) and budget constraints. But even they admit it may sometimes be necessary to employ incentives to help boost response from low-incidence populations or those who typically don’t respond under other circumstances.

To determine what kind of impact incentives might have on research, surveyors should consider splitting the sample and testing an offer-based invitation against one where no offer was made. While it is almost certain that a higher response rate will be achieved with the incentive, the surveyor can determine just how high that number will be, providing the opportunity to evaluate potential bias issues for future surveys.

5. The home stretch — get what you need, when you need it

Once the survey has been finalized, it’s important to closely monitor results as they arrive. With online surveys, users can perform real-time analyses, from charting to data mining to multivariate linear regressions. What’s more, it all can be conducted directly from the desktop — either at work, on the road or even from home.

Monitoring the results can help marketers better understand the nuances of their surveys and their questions, and helps make for better follow-up surveys. In some instances, if the questions prove to be too open-ended or are not achieving the desired results, questions may be rephrased and the survey re-launched immediately. **74**

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By Corinne Maginnis

Editor's note: Corinne Maginnis is the executive vice president in charge of online solutions for M/A/R/C Research, Irving, Texas. She can be reached at 800-884-6272, ext. 3431 or at corinne.maginnis@marcresearch.com.

As marketing research projects migrate from telephone or field to the Internet, a client's first question is often, "Will the online sample will be representative?"

The first question should really be, "Is the Internet the best environment for the project?" The following factors can help determine whether the

project is suited for the Internet:

- Can the survey be self-administered?
- Can the information about the product or service be effectively communicated on a computer monitor?
- Can the target respondent be reached via e-mail?
- Can members of the cyber-population reflect the client's target market?

Only after these questions are answered with a confident "yes" should the marketing research firm begin to procure and work an online sample to ensure and maintain a representative frame.

When field data collection migrated to the convenience of shopping malls, researchers learned how to manage a mall sample to be representative enough to meet their needs. Researchers work diligently to make the mall-intercept sample representative by selecting representative markets, placing demographic and usage quotas in each market and spreading the completes evenly across markets.

Online sample can be similarly managed to accomplish optimal representation. Researchers first tap into a variety of sources for e-mail addresses, such as list brokers, online

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Sample sources explained

- River sample or Web intercept or Web screened sample is a "pull" sample. Participants are screened and directed to surveys for which they qualify. This sample source is not reflective of a panel environment and little is known about the respondent except what is learned in the screening.

Generally, river samples have access to millions of potential survey participants. Marketing messages are placed in banners and ads to drive traffic to survey sites. The participants who respond are willing to do surveys to receive awards/points and are, therefore, highly cooperative.

Usage frequency can be controlled during the screening process in some of the river environments. Respondents are coded based on the type/category of survey completed and the timing of the survey so that they can be locked out of future surveys

based on the frequency of use rules.

- List sample is similar to river sample in that little is known about the respondent. These potential respondents have agreed to receive e-mail messages relating to a topic of interest but have not necessarily agreed to participate in research surveys.

These lists typically have low response rates (1-2 percent) and, generally, no controls are in place to control for usage frequency.

Research suppliers that use list sample resources can exclude respondents who have participated in and/or completed a similar survey for them in the past by supplying respondent identification for de-duping.

- Database sample is different from a list in that the member profile information is richer and there may be controls in place for usage frequency. In many cases, database

sample is used primarily for marketing purposes, not research. Some databases are positioned as panels but lack the structure and response rate of a true panel. Response rates vary from 5 percent to 15 percent for most database samples.

- Online panels have been developed predominantly for online survey research. Several online panels have been developed in recent years. Some have been developed by research companies, some by sampling companies and others by companies that know little about research or sample.

Panels enjoy the highest response rates (most 15-35 percent with some upwards of 50 percent) and offer the ability to control usage frequency by category, type of study, etc. Panel members have agreed to participate in surveys and are incented by the panel company for their participation.

panel companies and a client's own database of customers and prospects.

After an appropriate source for the online sample is identified, the research agency pulls and manages the sample. However, if a sample is randomly pulled simply to accommodate the target and number of completes needed, the sample will fail the representation test.

The following techniques can be used to ensure a representative sample for every online study.

- **Start with a balanced sample**

Online sample is a pull-type sample. The e-mail invitation to the survey "pulls" people to the interviewing site. The exception to pulling online sample is a "river sample" where respondents are "pushed" to an interview after being screened or inter-

cepted on the Web. (For more details on the types of samples, please see the sidebar.) If invitations are sent to a balanced or stratified sample, the probability of a balanced response is high.

To ensure representation is considered at every step, it is important to instruct the sample provider on how to pull the sample. Most sample providers look to the research supplier for guidance or instructions. Research suppliers can provide specifications, such as stratification parameters. These parameters will vary depending on the target markets, target respondent types and sample universe definitions.

- **"Quilt" your sample sources**

Multiple sample sources can be quilted together to form a more rep-

resentative sample frame. Perhaps the client database is the primary sample source, but a non-biased competitive analysis is needed. Quilting a list sample with the client's database will provide two cells to analyze and compare while allowing a competitive context to be added to the data.

In some cases, the target respondent cannot be fully represented in the online sample. At those times, the study should be conducted using multiple data collection methods. The online and offline samples can then be quilted to mitigate response bias and deliver full representation.

If quilting sample sources is required to achieve a sufficient volume of sample for the study, be aware that online panels are populated using similar methods. Therefore, a process for removing duplicates from the final data set is necessary.

- **Use a national representation**

As clients move ongoing tracking studies online, many seek a way to replicate random-digit dialing (RDD) sampling as closely as possible. Most sample sources can be balanced to Census demographics and geographic regions. However, mimicking a Census frame may not be sufficient in attempting to create a random probability sample online.

A nationally representative sample includes a representative sample pull from more than 3,100 counties, pro-



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portioned according to population in the four county sizes. Because some online sample suppliers are new to research, teaching the sample vendor how to pull these types of samples takes time and patience. However, the payoff is in the resulting representative data.

• **Employ propensity scoring**

Many researchers are concerned that online respondents are different than offline respondents. This concern is underscored by the presence of "professional" online panel respondents. Panel respondents are frequently online, and they also may take a number of surveys online which could possibly influence the responses they provide. Propensity models can help minimize the impact of both of these issues.

Propensity models are useful with panel or database samples where behaviors and demographics can be modeled. Through the use of propensity models, respondents can be weighted proportionately for the sample pull based upon their Internet

behavior, allowing for a more even representation of online/offline behavior.

Similarly, sample pulls can also be adjusted to minimize the impact of frequent responders and non-responders. Propensity scores applied during the sample pull will minimize the need for weighting during data processing.

• **Manage the sample to improve representation**

The techniques mentioned above are helpful in getting a representative sample pulled. But after the e-mail invitations are launched, the research supplier must continue to manage the sample to optimize representation.

Quota controls are needed to manage a balanced response. Letting all of the responses come into the data is fine if the client and research agency are only interested in volume/quantity of response. If a representative response is desired, then the research team must manage the response with quota controls and tracking quotas. Conversely, if the objective of the

research is to define the profile of the target audience, managing response with quota controls runs counter to that objective.

Most telephone RDD samples are managed through contact quotas and daily, weekly or monthly targets. Online contact quotas can be established with pull or push samples. Coupled with quota controls, contact quotas can be worked effectively online to produce a nationally representative sample.

A tracking study can be managed online the same way it would be managed in a phone center, significantly increasing the consistency with previous data collection.

Understand the source

A representative sample can be acquired in an Internet survey if specific techniques are applied. To gain comfort with online research, researchers must understand the source of the sample, how it is pulled and how it is managed during the interviewing process. [4]



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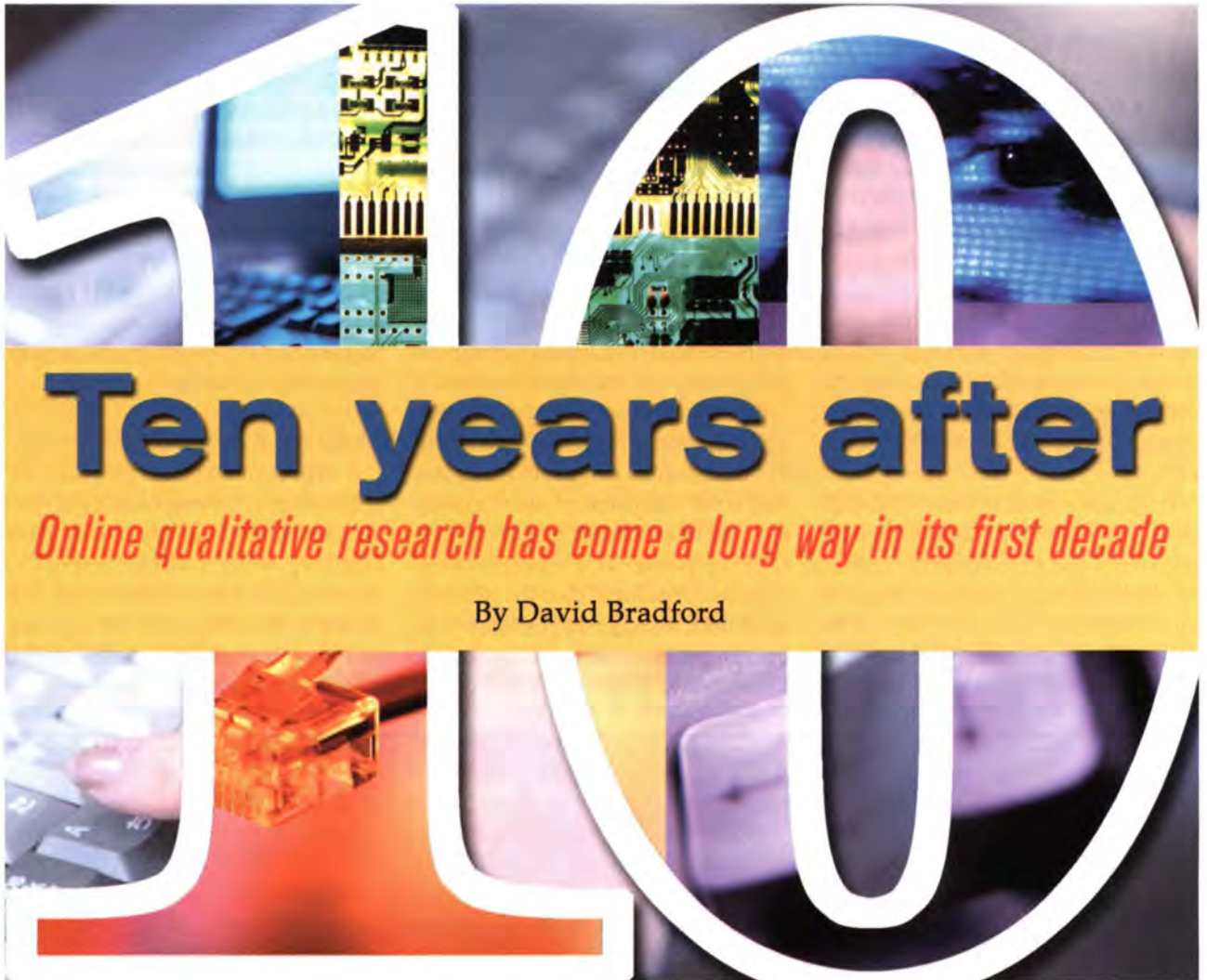
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Ten years after

Online qualitative research has come a long way in its first decade

By David Bradford

Editor's note: David Bradford is vice president of international sales and marketing of Itracks International, Inc., a Saskatoon, Saskatchewan online data collection company. He can be reached at dbradford@itracks.com.

2003 marks the 10-year anniversary of the first online qualitative research study being conducted. As its second decade begins, online qualitative research has matured and been honed into a powerful and versatile tool. We now know a lot more about appropriate applications for the methodology, its true strengths, and the proper moderating techniques and recruiting practices to use with it.

The first documented online group took place in 1993, conducted by

American Dialogue, which went on to become Cyber Dialogue. Mary Beth Solomon joined the firm in early 1994 and is now an independent qualitative consultant. She estimates that she has conducted approximately 1,600 online studies in the past nine years. "My experience has strengthened my belief that online methodologies can yield more data, and that the data is more insightful and closer to the truth. The respondent is situated in his own environment [home or office] and that impacts the way the respondent will communicate. The online environment fosters an honesty, openness and a willingness to give an opinion, without the concern for judgment that exists within any face-to-face environment."

Most early online qualitative research

was conducted using synchronous methods. These consisted mainly of live, real-time, moderated groups using a chat function as the means of communication, in a virtual replication of the structure of a traditional focus group, but lacking the respondents' facial expressions and nonverbal communication. However, other types of communications do emerge, says qualitative researcher Pat Sabena. "I find respondents more apt to give each other explicit support about personal disclosures in the online environment than in the face-to-face group. It's as if they are embarrassed to do this face-to-face but have no inhibitions online. A good example happened to me recently when a face-to-face respondent announced that her husband had died two weeks previously.

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Although I acknowledged her loss out loud, none of her fellow respondents said anything. But in a comparative situation online, everyone jumped in to express condolences and support.”

Asynchronous research

In the last five years, there has been a steady increase in the growth of asynchronous online research, which occurs over a period of time and uses posted comments within a moderated bulletin board communication format. This structure is quite different from most face-to-face qualitative methods, and as a result, it provides opportunities to conduct research that leverages the strengths of the Internet communication process. The asynchronous mode allows greater study design customization and flexibility, less impact on participants from technical issues (connection speeds, ISP reliability and typing proficiencies), and a greater variety of usage applications.

New debate

The asynchronous method for conducting online qualitative research is

also much less challenging for moderators, since they are able to participate with fewer technical and typing skills. They appreciate that they can conduct these types of studies simultaneously with face-to-face or real-time online groups. Qualitative researcher Jeff Walkowski began online moderating over five years ago and has developed training programs for traditional focus group moderators interested in conducting online qualitative studies. “I know there’s been a lot of talk about the growth of online message board groups at the expense of online real-time groups, but deep down inside I see both methods coexisting since each serves a different purpose. Real-time is great for gut-level reactions [early stage concept evaluation, ad evaluations, picking up on consumer language for a quantitative study, etc.]. Message boards are great for lengthier, thought-out answers to questions that require more depth. Message boards are also great for B2B studies, where respondents very seldom, if ever, have two-hour blocks of time to spare but can easily commit to five to 10 15-

minute blocks over the course of a week. I think that once the dust settles, both will be used equally. The desire to maximize spending by using online qualitative research methods to save on travel expenditures will always be there, especially in times like these of economic downturn.”

Emotional expression

An early misconception about online qualitative was that it didn’t allow respondents to fully express their emotions. While emotional expression may be different online, it can be just as powerful, says Susan Roth, who began her Internet research career at Greenfield Online and is now director of online qualitative research at TNS Intersearch. “Respondents tend to be very blunt online and if they feel strongly about something, they say it. This is extremely valuable when doing concept testing or customer satisfaction work. It is also useful when discussing more emotional topics. Respondent anonymity provides some emotional protection for the respondents and so they often open up quite a bit. There is a reason that online chat rooms and discussion forums have flourished: people have an inherent need to connect with others and express themselves on topics that are of importance to them. Online bulletin boards allow them adequate time to think through their responses and explain themselves thoughtfully as well as interact with other respondents. The results are often very revealing and insightful.”

Newer variations

In addition to the more familiar asynchronous and synchronous online group formats, several variations are emerging as more robust online research technology is developed. Asynchronous individual interviews allow researchers to conduct hundreds of simultaneous interviews and reinforce the importance of the opinion of individual respondents and clients, and allow for extensive probing opportunities.

“Using the interview mode, you can be sure that respondents’ answers are not being influenced by other participants,” says Lucy Edinborough, business manager at NFO Consumer Products in London. “That ensures that

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all participants have an equal share of voice and avoids the group-thinking that can occur in traditional qualitative groups. The asynchronous nature of bulletin boards is also beneficial in terms of client interaction. Clients can ensure that specific topics are covered, or they can ask the moderator to probe for more detail on new topics arising that they perhaps hadn't considered before."

Hybrid approaches

Another fairly recent variation is the hybrid study, which involve both qualitative and quantitative approaches within the same project. These types of studies can occur in either a synchronous or an asynchronous mode, and most involve larger numbers of respondents who are exposed to various types of stimuli including online surveys while they are being asked a series of open-ended questions. More powerful and specialized applications and tools are being developed as the interest in conducting these types of studies increases. Another hybrid variation is the use of existing Web technology

along with telephone interviews, like those conducted by Jeremy Bromberg of Boston-based Eidetics in various types of medical research studies. "We have found online qualitative technology to be excellent for one-on-one telephone interviews involving stimulus materials. This approach leaves us in control of what respondents see, allows clients to participate in the interviews right along with us, and minimizes respondents' opportunity to copy these materials," Bromberg says.

Tools for the times

Online qualitative benefits from the fact that many people use text to communicate over the Internet each day, whether it's via e-mail, discussion boards or chat rooms. As a result, most Internet users are extremely comfortable using typing to communicate their ideas and feelings.

In addition, busy respondents can be reached in their own environment at a time that is convenient for them. Discussion of sensitive issues that are difficult to address in face-to-face set-

tings is another area where an online approach merits serious consideration. Online qualitative approaches also offer a quick way to get answers for many types of studies from geographically dispersed individuals in a time of growing concerns over travel due to economic woes, epidemics and terrorism.

Looking forward

As always, the researcher should choose the modality that will best accomplish the objectives of the research. After 10 years of online qualitative studies, a wealth of information now exists to help make an informed decision on how to incorporate an online approach. Those who will not consider an online approach could be missing important insights that can be gained through a powerful and versatile research tool. Based on what we now know, as researchers continue to use online qualitative methods in new and creative ways, it appears that we are about to enter a golden age for this type of qualitative research. **(4)**

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Leveraging the Web for customer and employee satisfaction research

By Sam Goodner

Editor's note: Sam Goodner is CEO of Inquisite, an Austin, Texas research firm. He can be reached at 512-225-6800.

The satisfaction, loyalty and referenceability of customers directly impacts corporate growth and profitability. Therefore, measuring and managing customer relationships is critical to effective day-to-day operations and long-term strategic planning. Optimizing employee satisfaction is equally key to an enterprise's success, since satisfied employees are more productive and provide superior service to the company's customers. Frequent customer and employee feedback initiatives

— something as simple as a survey — can provide management with valuable input on both short- and long-term decision-making, giving companies critical operational and strategic advantages over their competitors.

Why use the Web?

Today's fast-paced, decentralized business environment and increased worker mobility have combined to pose unique challenges for companies of any size when gathering critical customer and employee feedback. The emergence of Web-based survey solutions enables enterprises of all sizes to achieve a new dimension in efficiency by integrating

Web survey technology with existing infrastructure such as CRM and HR information systems. Today's Web survey solutions are designed for the non-technical business user and make it easier for enterprises to take advantage of technology that gathers the data needed to make better business decisions and to transform a B2C or B2E satisfaction initiative into a practical, cost-effective reality.

The single greatest advantage in utilizing Web survey tools is the ability to rapidly acquire the customer and employee feedback critical in identifying issues, concerns and trends that contribute to dissatisfaction and attrition.

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Rather than the weeks or months required to distribute paper questionnaires and receive the results or to contact respondents by telephone, the Internet allows responses to be collected in a matter of hours. Bolstered with this information, organizations can take necessary actions to implement strategic and tactical solutions to increase satisfaction, reduce employee attrition and increase client retention.

Another obvious benefit of using the Internet is significant cost reduction. Web survey technology eliminates the production and mailing costs associated with conventional paper surveys. Research has shown that because Web surveys are easier to complete, response rates are significantly higher, resulting in increased data accuracy. Survey responses can also be validated during the completion process, minimizing data entry errors. And because survey results are automatically collected, they are available for immediate analysis.

Online survey administration, which allows users to manage the survey process through a common browser, is another Web-enabled capability that

delivers concrete benefits. With this functionality, users can perform a range of administrative tasks, including activating and deactivating surveys, setting response limits and cut-off dates, purging surveys, viewing reports and publishing results on the Web. Users also can access and distribute reports to multiple appropriate audiences or export data to popular reporting tools like Microsoft Excel and SPSS.

Choosing the right technology

Awareness of the benefits that can be derived from a survey initiative based on Web technology is just the beginning. Faced with an array of survey tools in an expanding market, how do you make the optimum choice for your business needs? Based on input gathered from executives across the country, the following overview highlights some of the key features that should be evaluated when selecting a survey system.

• *Ease of use*

Not surprisingly, a tool that requires substantial technical expertise will quickly become shelfware. An easy-to-

use program lets virtually anyone create, deploy and manage a survey, which minimizes the learning curve, reduces IT support and simplifies the survey process.

• *Installation options*

Survey tools can be installed either as a hosted application service provider (ASP) solution through a third-party Web site or as a licensed product directly installed on a customer's server. The installed option allows the client to exert maximum control over IT performance and custom configure based on their security requirements. An ASP option generally speeds implementation, minimizes upfront ownership costs and can overcome a lack of IT staff and infrastructure.

• *Survey appearance*

A great-looking survey invites more responses than one that looks unprofessional or is too time-consuming to complete. A higher response rate improves the accuracy and resulting value of the data. A good survey tool allows you to customize the exact look of your surveys to match your corporate identity and existing collateral by adding backgrounds, images and HTML templates. Whether a user opts to start from scratch or to take advantage of provided templates, many Web survey applications can produce professional-looking surveys at minimal cost.

• *Question design and planning*

Question design and planning remains one of the most challenging aspects of survey research. Web-based survey solutions offer a variety of features that help users with question design. Multi-scale questions allow users to design survey questions that can measure several related factors simultaneously. A traditional dual-scale question might measure, for example, the satisfaction rating a respondent gives a company's help desk as well as the importance the respondent personally assigns to help-desk support.

Answer randomization allows users to improve the validity of surveys by removing the statistical tendency of respondents to select some answers more often than others based on their

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positions within the list of available answers.

- *Automated content guidance*

Sample survey content, like question-and-answer scales, can be selected from the product library, or users can create their own questions and archive them for use in future surveys. And the optional use of survey wizards (automated shortcuts) provides step-by-step guidance for the non-technical user. After guiding the user through a few questions, survey publication wizards can make the distribution process as simple as a mouse click. Once a survey is ready, it's easily deployed to the Internet.

- *Invitation management*

Some survey tools will allow you to manage the entire survey invitation process by loading e-mail addresses into a database, distributing survey invitations at specified times, tracking responses and sending e-mail reminders.

- *Analysis and reporting*

One of the greatest advantages of Web surveys is their ability to immediately analyze and report survey results. Online reports typically include counts and percentages, descriptive statistics, ranking summaries, pie graphs, bar charts and text responses. Reports can be viewed online or published to the Web. In addition to viewing survey responses in a browser, many survey products will export data to reporting tools like Microsoft Excel, Adobe Acrobat and SPSS formats.

- *Scalability*

When evaluating a Web-based survey solution, managers should consider both the current and future needs of the organization. Tools designed to support an unlimited number of surveys and respondents are more appropriate for a growing company or a larger organization surveying across a global corporate enterprise.

- *Security*

A feature like respondent authentication allows only designated respondents to take a survey and precludes their responses from being collected more than once — without identifying questions. From an IT perspective, users can control access to administrative func-

tions, reports and data through passwords. Security lockout features can be used to disable access after a failed number of attempts, such as using an incorrect password.

A few Web survey tools offer security features to protect the integrity of the data, such as use of the Secure Socket Layer (SSL), so all communications with surveys and the administrative site can be encrypted to protect the information as it travels over the Internet. Stored survey responses can also be

encrypted to protect the data from unauthorized access.

Return on investment

Although the target audiences were different, two industry leaders recently shared how they embraced Web survey solutions to gather the data they needed to make better business decisions. By using a Web-based survey tool, both companies were able to rapidly acquire customer and employee feedback critical to identifying issues and making real-

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Wheels, Inc., a large full-service U.S. fleet management company with annual revenues of more than \$1.5 billion, has begun using Web-survey technology to gauge the quality of service its customers receive through the company's national network of authorized automotive repair and maintenance facilities. Based in Des Plaines, Ill., Wheels manages the life cycle of fleet vehicles, from acquisition and operations to maintenance and remarketing, for more than 450 customers in the corporate, government and service sectors.

Likewise, executives at Cleveland-based KeyCorp, a large bank-based financial services company, know that optimizing employee satisfaction is key to the success of this Fortune 500 company. KeyCorp uses surveys as part of its business-to-employee (B2E) strategy to gauge the effectiveness of its training and benefits programs among a workforce of almost 22,000 employees across 45 states.

The use of a Web survey solution has enabled the KeyCorp team to significantly increase the number of employee surveys administered. Since the solution's implementation in early 2001,

KeyCorp has nearly doubled the number of internal surveys it conducts — without significant staffing increases. In 2000, just prior to the implementation of a Web survey system, Key Market Research deployed 70 surveys. In 2001, that number grew to 100, and more than 150 surveys were completed in 2002. Although the number of survey projects continues to rise, only one additional analyst has joined Key's staff of four research project managers since the implementation.

In July 2002, Wheels began using a Web-based tool to poll drivers who have been involved in accidents or who require routine maintenance about the quality of service they are receiving at the more than 90,000 facilities in the company's authorized service network. Drivers are asked by Wheels to rate the quality of service for all aspects of the repair process — everything from the knowledge and responsiveness of the shop personnel to the speed and quality of the repairs to their vehicle. Drivers also are given the opportunity to recommend whether vendor locations should remain within the service network.

Prior to the implementation of a Web survey application, Wheels used paper surveys to poll drivers on the firm's various customer-service initiatives — a process that could take eight weeks from beginning to end. Web surveys now serve as the source of benchmarking data used to identify areas needing improvement in fleet operations. By using the Web, Wheels' survey process has been reduced to just two weeks, eliminating aspects of conventional survey deployment such as customization, design, printing, postage and manual data entry. Wheels conducts between 25 and 50 customer surveys annually and fully expects this number to grow.

Make better decisions

The advent of the Web-based survey enables enterprises of any size to quickly gather the strategic intelligence necessary to make better decisions. As the foundation technology of many successful B2C and B2E strategies, Web-based surveys can help CRM and HR initiatives achieve new standards of accuracy, impact and cost-effectiveness. **TM**

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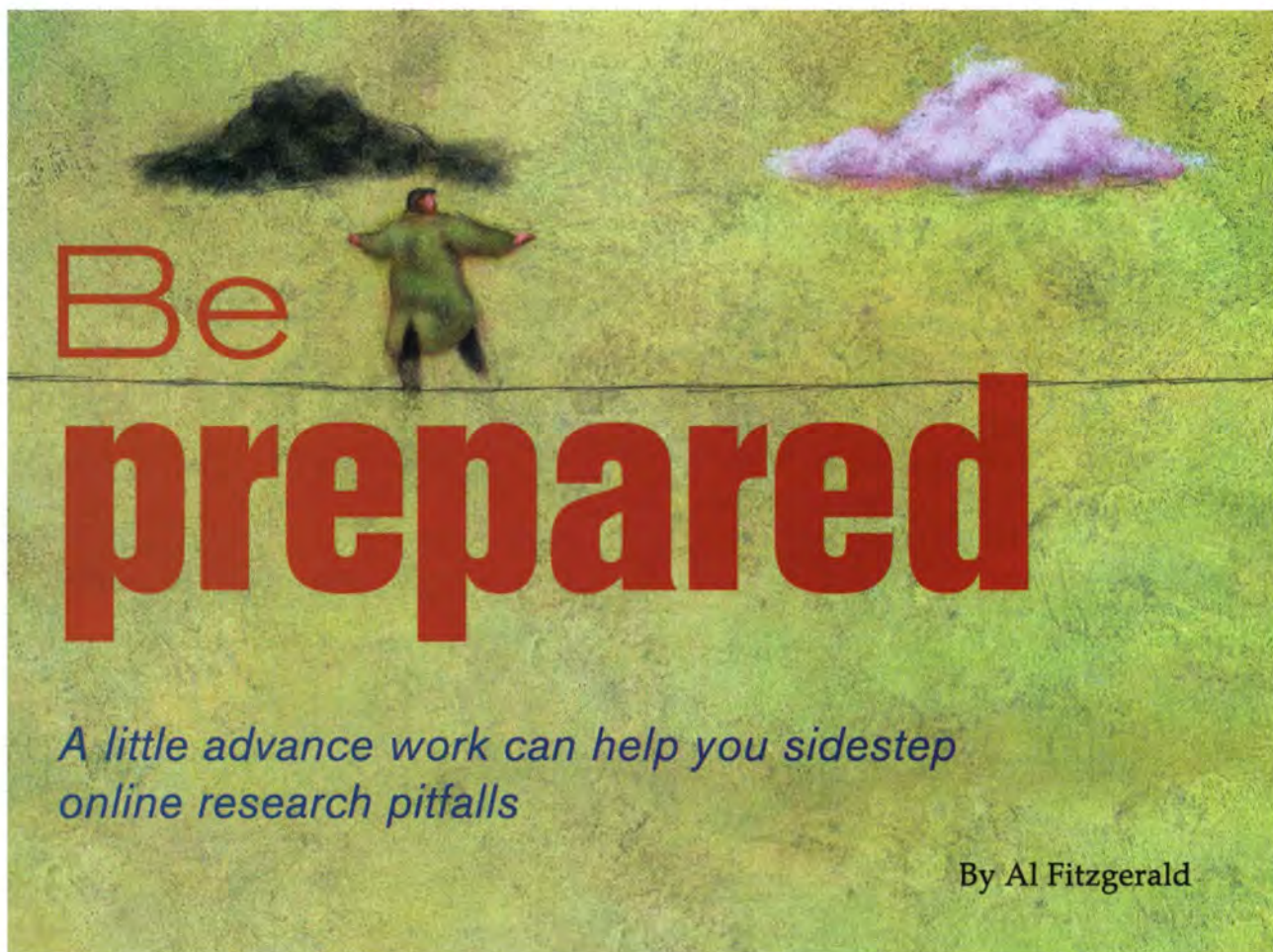
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Editor's note: Al Fitzgerald is president and founder of Answers Research, Inc., Solana Beach, Calif. He can be reached at info@answersresearch.com.

With well over 600 million Internet users worldwide, there is no questioning the viability of online surveying to collect market research data. A steady general growth along with huge usage percentage leaps in the U.S., Europe and the Asia-Pacific region have allowed marketers to maximize scant research budgets and include otherwise cost-prohibitive samples in a study's scope.

This online expansion has occurred despite a common economic slowing, and as consumer and business users continue to recognize the value

online communication provides — with sure-sell features including real-time data transaction and the elimination of time and space consuming paper trails — we can only expect a continued rise. To ensure an online study delivers actionable, timely and cost-saving results, marketers must be mindful of the vast number of pitfalls that can trip up even the most seasoned researcher. These snares can occur at any phase in the research process but are easily circumvented by careful planning by project managers prior to beginning any online study.

Underestimating complexity

Because large phone rooms are not needed for online data collection, companies have been tempted to “in-source” studies for which they would

typically hire an outside data collection firm. In theory, this provides huge research budget savings by having an in-house IT department program and host the survey. In practice, it can stretch an internal research department too thin.

Even an online study completed strictly via e-mail can be a time-consuming event. In this case, recruitment is conducted via e-mail with the survey included in the invitation. Respondents need only e-mail back their answers and the internal market research team can keypunch results to slice the numbers and conduct analysis. Most e-mail studies, however, involve sample procurement and cleaning, keypunch programming to ensure logical skip patterns, fielding management (being mindful of any quotas), data download and

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cleaning, and final analysis and reporting. With the internal research team providing critical strategy and objectives, the implementation and analysis processes are often best completed by securing the help of experienced outside researchers assigned to ensure each phase is completed without a hitch.

Panel overuse

There is no denying the rewards

of using a panel to recruit for an online study, but it is imperative to utilize this tool without compromising data quality. Since contact and profiling data (provided in the initial membership survey and subsequent screeners) for each member is included in a database, a list of targeted sample can be created in a few keystrokes.

While panel usage is a key factor in being able to minimize fielding costs, careful database management must be taken to prevent respondent overuse. At a minimum, survey participation must be limited to avoid any bias, and utilizing the same panel to complete multiple simultaneous studies should be avoided or scrupulously monitored.

Recognizing the limitations

As global online penetration grows, using an Internet methodology is fast mirroring a traditional telephone random-digit dial methodology. Even when online data collection closely matches the projectability of a telephone survey, there may still be benefits to telephone or in-person approaches that trump online surveying.

Conducting questionnaires via phone or in-person enables probing to better understand answers. In a case where it is crucial to ask open-ended questions, having a trained interviewer is an advantage. For instance, on written surveys (such as paper or Web-based surveys) a respondent may say "speed" was the reason for selecting a brand without clarifying what they mean by speed. An in-person or phone interviewer can ask for this clarification.

Telephone or in-person data collection methodologies are necessary if no e-mail address or name is available, although these methods are often relatively unproductive and expensive when compared with online data collection. For example, with no e-mail address — or even the name of a person — respondents can be recruited by calling a company switchboard and asking for a referral (in the case of a business

interview) or using a telephone book or in-person intercept methods (to find consumers).

Programming

Aside from finding the actual respondents to complete the survey, the most important factor in the success of an online study is the survey design. It is critical for researchers to have a lucid survey (including logical skip patterns, etc.) prepared before the questionnaire is programmed. The sponsoring marketers should be involved in survey content development by providing a list of clear objectives, including the business decisions to be made using the collected data.

Once the survey is programmed, it must be tested to ensure a flawless presentation on all browsers and monitor sizes. This is the final chance for mistakes to be corrected and any modifications to be added. Re-programming costs should be clearly discussed so that unexpected additional costs do not erode the relationship between a company and contracted research firm.

Professional respondents

Typically, using a Web-based approach lowers non-respondent bias due to higher response rates. Since respondents can take the survey at a time convenient for them, a higher percentage of respondents participate. Otherwise, respondents who are less busy or easier to reach disproportionately participate in surveys. This can be seen in telephone surveys where education and government respondents often disproportionately complete more surveys than they represent in the overall telephone list.

Marketers require thoughtful answers to their questionnaires, not hurried responses to get to the incentive at the finish line. To minimize these incentive-interested respondents, it is imperative to conduct careful sample management. If panels are utilized, limitations must be included in the membership contract that specify the maximum number of

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surveys that can be completed annually. Enforcing strict screening requirements and disclosing the study's sponsor can aid in getting the most honest answers out a respondent. If participants stand to benefit from their answers, they are more likely to carefully consider their responses.

Overestimating the convenience factor

A common misconception when conducting online research is that the data collection is "simple" and little can go wrong. While the pressure of not having to complete surveys via phone lessens the visible urgency, the fielding process requires constant monitoring. Respondents may require two or more e-mail reminders or even a phone call to spur them to complete the questionnaire. If quota groups are included, respondents fitting that group's profile should not be allowed to complete the survey once that quota is reached. Regardless of whether the data is needed for analy-

sis, the respondent must be paid the incentive for completion.

Hard-to-fill quotas may require additional recruitment efforts. Daily or even hourly monitoring is required to gauge how many completed surveys are still needed, and whether additional incentives or sample is required. Research project managers are wise to scour the recruitment specifications prior to the start of fielding to ensure the study's sponsor knows the difficulty of reaching their targets.

Phone vs. Web

Notwithstanding cost-savings being a key selling point of utilizing Web-based surveying, marketers must not assume that Internet surveys are always less expensive than a phone approach. In general, when conducting surveys among a group of less than 100, programming costs outweigh the benefit of completing a survey online.

In cases where there are small sample sizes with a small list of qualified

candidates from which to recruit, it is most effective to call each respondent on the list to complete the questionnaire over the phone. Additionally, researchers must be aware of the situations in which a pure random sample of a population is required. In this case, a telephone random-digit dial method is often employed.

Projectability

The growth in the percentage of people who have access to the Internet either at home, work, or school results not only a rise in online access rates but a decrease in any data bias that may occur via an online methodology. Still, until Internet usage rates match those of the phone (with over 95 percent U.S. penetration), measures must be taken to ensure results are projectable to the whole of the population the study represents.

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study's projectability. Additionally, a dual telephone/Web methodology can be implemented. In this case, respondents are recruited via phone and given the option to complete the survey immediately on the telephone, or at a later time on the Web.

Poorly-written invitation letter

Even if a survey is designed according to the client's exact specifications and programmed with logic in place, if

the invitation to complete the survey is not enticing, the study may never get off the ground. The invitation should clearly outline the rewards the respondent will receive in exchange for participation, state how long the survey will take to complete, and the reason why the research is being conducted.

Unfortunately, the explosive rise of Internet usage has been closely shadowed by the proliferation of spam. In the continuing battle of e-mail user vs.

spammer, people tired of sifting through messages from unknown senders often program their e-mail mailboxes to filter messages of unknown origin to a junk or trash folder. Whether the e-mail invitation makes it to the inbox or junk mail file, it stands a better chance of being opened if as much as possible is revealed in the heading.

Internet connections

As is true for most studies, the simpler the survey the better. However, the Internet does offer the benefit of supporting images, and if including these will give respondents a better idea of the product, service or concept they are answering questions about, marketers are wise to incorporate them. While simple graphic images (such as jpeg or gif graphic files) can be accommodated by respondents regardless of their connection speed, more sophisticated images require greater bandwidth.

Incorporating real-time video into a survey may work fine if the respondent has a broadband connection — Internet users in a business environment fit this bill. However, expecting the average consumer to be able to complete the same survey would lead a marketer back to the drawing board. No consumer with a dial-up modem connection will wait the many minutes required for a video download. Researchers must have a thorough understanding of their audiences' technical capabilities — as well as their patience levels — prior to adding large image files.

Make the most of it

It stands to reason that as Internet usage increases, the implementation of studies using a Web-based fielding methodology will also grow. Despite its association with speed and savings, marketers need only get burned once to never again underestimate the complexities of online implementation. By beginning a Web-based research project with an awareness of the factors for success and the consequences of poor planning, marketers are best prepared to make the most of this viable methodology. **74**

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Are you talking to the right people?

The importance of online panel quality

By Hugh Davis

Editor's note: Hugh Davis is founder of Greenfield Online, Inc., a Wilton, Conn., research firm. He can be reached at 203-834-8585.

Modern technology has created an environment where time-to-market, brand recognition and the battle for market share are being compressed into abbreviated life cycles by fierce competition and an ever-more-demanding business and economic environment. The ability to obtain market feedback is now more important than ever, as corporate decision makers must

make quick, yet well-informed business decisions. Having customer intelligence at hand lets companies make more educated business decisions and therefore obtain a competitive advantage. Today's marketing researcher is offered a great variety of methodologies from which to choose to gather such intelligence, and clearly online research provides many advantages.

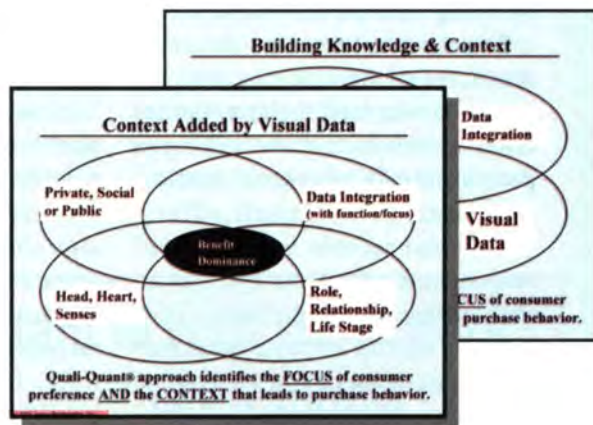
Online research offers benefits beyond speed and cost. There is a remarkable ability to collect information about a wide variety of topics, many of them quite sensitive.

For anonymity and 24-hour-a-day convenience, no other methodology matches the Internet. A person can answer thoughtfully at his/her leisure without the distractions and the negative, "interrupted" mindset so common in real-time interactions. The research industry is plagued by declining response rates for telephone and mail studies. CMOR (The Council for Marketing and Opinion Research) reported 11.7 percent cooperation rates in April 2002, down from 16.5 percent in 2000, and Internet panel study cooperation rates as high as 70 percent in 2002,

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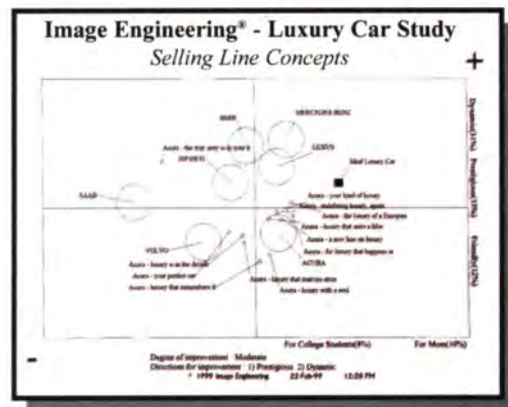
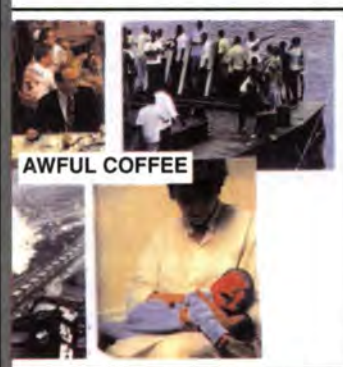


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making online research, specifically panel research, an even more viable option.

Opt-in participation is key to building a cooperative panel

To realize the benefits described above, researchers must have access to people who meet their respondent criteria, who in turn are willing to participate in research studies. Online research panels offer a proven and reliable way to survey respondents who have opted-in to participate in research studies. They not only sign up for the express purpose of participating in surveys but also must double-opt-in. The double-opt-in process requires the potential panelist to respond to a confirmation message after registration, before entering the panel, ensuring that the e-mail address is valid.

Demographic and behavioral information is collected upon enrollment, which ensures that when sam-

ples are pulled from the panel they are an accurate representation of the population under study. Whether using quota sampling to fulfill desired quotas, mirror census, or online populations, having a deep demographic profile results in well-balanced samples.

In addition, marketing research studies are often highly targeted, and pertain only to certain consumers. The ability to precisely target specific consumer groups via an online research panel ensures that marketing professionals are surveying respondents that meet study objectives. Participants are also much more likely to cooperate when the topic under study is relevant to them.

Many factors influence response rates

Studies have shown that people who have made a conscious effort to become panel members consistently stay involved and actively participate in online surveys. Much

research has been done on the variables that impact the level of response. In online research, response rates are used as one basis for calculating incidence level, which is ultimately a major factor in determining the cost of survey respondents or total project cost. For example, if it is known that a certain demographic represents 30 percent of the online population, it can be estimated that of those that are invited 60 percent will complete the survey. Both factors must be considered when determining the number of invitations mailed to achieve a desired ending sample size.

Though panelists have been pre-recruited to participate in online research surveys and there is no cost to contact them, panelist attrition, the initial cost of recruitment and incentives must be considered when calculating sample cost.

While response rates are often viewed as a measurement of the quality of an online panel, true suc-

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cess is achieved and primarily driven by the availability and willingness of the respondents requested to participate in surveys. Measurement of panel cooperation is often subject to incentives offered as well as by the member's engagement level and the depth of the profile used to create the sample. However, higher response rates are most notably achieved when members opt-in and make a conscious effort to participate in surveys.

Panel robustness begins at recruitment

While having respondents opt-in 100 percent to participate in online surveys increases panel quality and ultimately the quality of the resultant research, a panel's size and its robustness also determines the ability to fulfill a client's demanding sample needs. Varied demographics are more likely represented when a panel recruits members from multiple sources including various Web sites and uses several types of strategies such as banner advertisements, text links and media placements. Panels that rely on a single source for recruiting participants are oftentimes less robust and can easily become obsolete if the recruitment source loses its audience or decreases in popularity. Additionally, companies that support a multi-sourced recruitment procedure have access to many diverse Web sites, and therefore a greater ability to target low-incidence, specialty or less-responsive demographic groups.

To ensure high cooperation rates, faster survey completion, and long-term participation, online research panels need to be actively managed. In fact, employing personalized and relevant communications to valued members is extremely important in building and maintaining relationships. For example, members are e-mailed survey invitations at least once every 15-20 days to maintain participation and sense of community.

It is also important to re-profile

and continuously update member information collected upon enrollment, appending relevant information as needed. Completion rates must also be monitored and the panel supplemented as attrition occurs. Removing professional respondents, or those who participate in an excessive number of surveys, as well as non-respondents on a quarterly basis also helps to ensure high cooperation

rates. In this way, the panel is continuously refreshed and communication strategies are monitored to ensure active participation.

Adhering to best practices

The importance of understanding the principles of marketing research and adherence to best practices cannot be underestimated. First, research companies should respect

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panel members' privacy. To receive honest and truly valuable answers to survey questions, a detailed privacy policy needs to be outlined for members. The policy should detail how the information or data collected is used, transferred and reported. In addition, panel companies must demonstrate a commitment to quality by upholding those standards set by professional organizations such as ESOMAR (European Society for Opinion and Marketing Research), CASRO (Council of American Survey Research Organizations), ARF (Advertising Research Foundation), and MRA (Marketing Research Association).

Practical considerations for panel-based research

Though panel-based research is always considered to be best when fielding studies online, there are several instances when especially relevant.

Research that requires respondents

to provide answers to sensitive subject matter questions can be best served by an online panel. As online panel members understand that the information they provide is being held in confidence and used appropriately, they are oftentimes more willing to respond to questions that may involve issues such as income, race, personal behaviors, etc.

Second, as companies look to introduce new products and conduct concept tests, it is recommended that an online panel be used. Members understand the confidentiality associated with marketing research and they have read the terms and conditions involved in participation. As more than 35 percent of studies conducted in 2001 were product and/or concept tests, this is extremely relevant. (Source: *Inside Research*)

Finally, when research involves long-term product usage, or if complex tasks need to be executed, it is recommended that an online panel be the source for respondents.

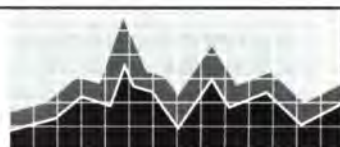
Participants are comfortable completing product tests and can be re-contacted over time with predictable cooperation rates. One of the most rapidly growing research study designs being migrated to the Internet is IHUT (in-home usage testing), which further stresses the importance of the ability to re-contact respondents.

Online research evolves

Online research has its advantages, and certainly, helping companies achieve financial gains by discovering, understanding and closing gaps between their brand promise and their customers' experiences is one of them. Consumers are the driving force behind brand success and receiving feedback on an ongoing basis enables marketers to make more informed and effective decisions that ultimately provide immeasurable return on investment by lowering customer acquisition costs and improving retention rates. Online



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research has enabled marketers to receive such feedback in real-time.

Marketing research initially was conceived based on marketers' need for more information; now advanced technology makes it possible to gather more cost-efficient and timely data, paving the way for ongoing continuous interaction with target audiences. With the advent of these new research technologies also comes the ability for businesses to more easily create and maintain relationship-building strategies with customers. The benefits of these enhanced capabilities are an enormous point of differentiation between online and offline research. Under the constraints of traditional offline research, a business would extend a great deal of time and money on a routine basis to track the opinions of an existing customer base. With online research technology, surveys are sent instantly on a predetermined schedule and responses are returned in real-time. This method of information gathering


feeds directly into CRM strategies, allowing businesses to maintain an ongoing dialogue with respondents and remain aware of their wants and needs.

Respondents need to be considered

Attributed to the benefits outlined above, the online research industry is expected to grow an average of 30 percent annually over the next two years (Source: *Inside Research*). As such, there will be a growing need for survey respondents. It is important that online marketing research companies provide respondents with a positive survey experience, to continue to benefit from high cooperation and response rates. Declining telephone and mail survey cooperation rates have been attributed to telemarketing abuses, and an abundance of unsolicited interruptions, which industry associations are banding together to prevent from happening online.

In addition to methodological and

executional improvements, companies can now provide the respondent with an extremely positive survey experience. Video and audio segments can be embedded into the body of a survey and can be quickly and easily downloaded, enabling respondents to get a more realistic picture of the product or service under study, thus improving the integrity and accuracy of the research being conducted. Surveys themselves will continue to become more and more engaging.

Such enhancements, and the ongoing consideration of survey respondents, will enable the online research industry to continue garnering response rates that are 70 percent and higher. Organizations like CASRO, CMOR, ESOMAR, MRA and ARF are committed to maintaining the integrity of online research and protecting the privacy of respondents, ensuring that this valuable methodology will grow and evolve in the years ahead. 

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Ready to get behind the wheel

Generation Y offers huge market for automakers

By Brian Maraone

Editor's note: Brian Maraone is project director at Synovate Motoresearch, Troy, Mich. He can be reached at brian.maraone@synovate.com or at 248-288-8529.

A great opportunity exists for automakers to target Generation Y. With the number of 16- to 25-year-olds projected to jump from 37.9 million to 42.7 million by 2010, competition for Generation Y's business will be fierce. However, many automakers do not have an adequate understanding of this youthful market segment, which limits their ability to develop vehicle designs and marketing/advertising campaigns to appeal to this growing population, many of whom are first-time vehicle buyers.

Generation Y includes people born between the 1977 and 1994. The size of Generation Y is linked to the explosion of the Baby Boomer generation, which occurred between

1946 and 1964. This explanation leads many people to refer to Generation Y as the "Echo Boom."

Generation Y is very different from previous generations. One of the main differentiators is that they are more comfortable with technology than any previous generation. Having grown up with computers and the Internet, they see technology as a tool rather than a barrier to overcome.

Study overview

In August 2002, Synovate Motoresearch Inc. conducted an automotive youth pilot study using an Internet research methodology. The study focused on five areas: general preferences, buyer behavior, purchase influences, brand awareness, and future vehicle considerations and aspirations. The entire survey, with the exception of the general preferences section, was focused on automotive issues.

The survey was designed to answer the following key questions:

- Who is Generation Y?
- What types of vehicles do the youth currently own and why?
- What does Generation Y look for in a vehicle?
- What kinds of things affect Generation Y's purchase intentions?
- What opinions does Generation Y have about specific automotive brands?
- What type of vehicle and what features does Generation Y want in their next new vehicle?

The nationally representative sample was drawn from the Synovate U.S. e-Panel. The study was in the field for five days. A total of 172 completed surveys were collected, for an overall response rate of 50 percent.

General preferences

The survey began with some gen-

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eral questions regarding music, television, and activities. Pop, rap, and hard rock were the most listened-to music genres with Generation Y. Among the activities participated in, watching TV, surfing the Internet and watching videos were mentioned most. The Internet is a very large part of Generation Y's everyday life: About half spend at least one to 10 hours per week on the Internet. Only 1 percent indicated that they hardly ever use the Internet.

When asked about favorite automotive Web sites, Kelly Blue Book, Autotrader, manufacturers' Web sites, Consumer Reports, and Car and Driver were visited the most. These sites provide the information that Generation Y looks for when shopping for a vehicle. In addition, they expose them to the latest trends and styles that automakers are developing.

Buyer behavior

Each respondent was asked what he or she owned/drove the most.

Interestingly, four out of the top five models indicated were domestic brands. However, the top vehicle owned/drove was the Honda Accord. Furthermore, it was found that more than half of the vehicles currently owned/drove were used vehicles.

Over the past few years, import brand vehicles have become more popular amongst the youth generation. We found that about 56 percent of our sample that had a new vehicle drove an import brand like Honda or Volkswagen. The market trend seems to be turning away from the "bigger is better" mentality as far as engines are concerned. This is not to say that they don't want performance; on the contrary, they want performance but don't feel they need to have big, gas-guzzling V-8s to achieve their performance needs.

Even with the flood of new vehicle buying services, approximately two-thirds of our sample indicated that they still purchased or leased their vehicle from a traditional dealership. It is also interesting to note that of

those who purchased or leased their vehicle from a dealership, 95 percent of them picked a vehicle from the lot rather than ordering one from the manufacturer.

Perhaps not too surprising, vehicle cost is a huge influence over purchase decisions, so the majority of vehicles being driven are used vehicles. Price/monthly payments was the most-mentioned reason why they chose their current vehicle over their second-choice vehicle. Value for the money and practicality were also very highly regarded.

Self-expression through vehicle personalization is another dominant theme among Generation Y. This drive is especially evident when you attend shows like Hot Import Nights, which are automotive events geared to young owners. At these shows, automakers and private owners display their vehicles, most of which have top-notch speaker systems, the newest DVD and navigation systems and customized wheel rims.

Thirty-six percent of the sample indicated that they have purchased a radio/CD player for their current vehicle. Navigation systems and DVD players were also among the top tech features desired. Other popular accessories included wheels/tires, extra speakers, and tinted windows. The average amount spent on the accessories was \$732.

Purchase influences

Automakers often wonder if it is worth spending huge amounts of money sponsoring certain sporting/musical events and whether it actually affects Generation Y's automotive purchase decisions. Overall, community involvement, motor sports, sports and concert sponsorships exhibit little influence over this group's purchase decisions.

Factors that do have influence include test drives, recommendations from family members, visiting dealerships, and *Consumer Guide*. Amongst the 16- to 19-year-olds, test-

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drive experiences were still very important, but recommendations from friends were also very important. Peer pressure also plays an important role in Generation Y's purchase decisions.

Brand awareness

Results from the brand awareness section yielded some interesting pieces of information. Korean automotive brands such as Kia and Hyundai were disliked most by Generation Y because they perceive these brands to be cheap, unattractive and unreliable. Through a perceptual mapping technique, we found that Honda, Volkswagen and Jeep made the most appealing vehicles to Generation Y. They are viewed as innovative, cool and exciting.

Other vehicle issues

Transmission types have traditionally not been such an important thing for automakers to worry about since automatics dominated the market. However, we found that amongst the youth generation, manuals and auto-stick transmissions are becoming more sought after. As stated earlier, performance is important to Generation Y. Manuals and auto-stick transmissions add to the "fun factor" of their vehicle.

The general feeling of Generation Y toward environmentally-friendly vehicles is that they like them and want to drive them. However, our research shows that only a third of those surveyed would be interested in owning an environmentally friendly vehicle for their next vehicle. Some of the reasons for the lack of interest include perceptions that they are underpowered, unreliable and expensive. In addition, most of the current environmentally friendly vehicles have a different exterior styling that doesn't appeal to Generation Y.

Recently, automakers have been extending their warranty lengths with the hopes of attracting the

less-affluent youth generation. More specifically, the length of an automaker's power train warranty has become a way to gain a competitive advantage. For example, Hyundai offers a 10-year power train warranty, and Chrysler offers a seven-year power train warranty. Our results show that warranty length has a lot of influence over purchase decisions.

Untapped market

Generation Y is largely untapped market that has tremendous potential. The future success of many automakers depends on how effectively they are able to appeal to the youth. While some efforts are currently being made, much more could be done to ensure the loyalty of this important generation for years to come. *TA*

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Survey Monitor

continued from p. 8

of the cinema audience's spending. DVDs are 73 percent more likely to be purchased, video games 52 percent and digital cameras 44 percent.

- Frequent moviegoers are 50 percent more likely to spend \$150 or more on their cellular phone bill and 41 percent more likely to be in the market for a cell phone.

Last-month cinema audiences rely less on television, radio and newspapers for advertising and are more frequent users of Internet and outdoor media. Against the national average, last-month moviegoers are 29 percent more likely to be heavy Internet users and 9 percent more likely to be heavy users of outdoor media.

While summer and winter holidays are considered peak movie seasons, cinema reaches large audiences throughout the year. In July 2002, 42 percent of adults age 18 and older went to the movies in the past month. Thirty-two percent reported going to the movies just before the holiday season, according to the December survey. Thirty-seven percent went to the movies during the peak season, according to the January survey. The study supports the conclusion that consistent, multiplatform advertising

mixed with entertainment will enhance consumer impact and enjoyment. For more information visit www.arbitron.com.

Sure love you honey! Honey?

American males are significantly more satisfied with their current relationships than are their female partners, according to a nationwide study of love and romance by Arlington, Texas-based Decision Analyst's American Consumer Opinion.

A recent survey of 744 men and women, drawn from a balanced sample of the American Consumer Opinion Online panels, found that 72 percent of the male respondents were "very satisfied" with the relationship they share with their current spouse or partner. By contrast, only 61.3 percent of females felt able to say the same thing. This lower satisfaction among females is reflected in their judgments on their marriage: more than twice the number of females (8.8 percent compared to 4.3 percent for males) wished they were not married at all.

One crucial explanation for this difference between genders may lie in viewpoints on the characteristics of the ideal partner. Although both males and females agree on the top four char-

acteristics desired in an ideal partner — trustworthiness/faithfulness, a sense of humor, honesty and similar moral values — women place a greater priority on these four, with faithfulness in particular showing a clear gender divide. For men, while these characteristics are important, a whole range of other factors are also crucial, including, somewhat surprisingly, a romantic outlook and, less surprisingly, an athletic and pretty physique.

While the male attraction to beauty might be deemed superficial (although women too have their own superficial desires, as they considered the wealth of a potential partner more than twice as important as males do), men nonetheless appear more able, or willing, than women to compromise on their own ideals when faced with the practicalities of a relationship. When asked what is most important for a happy marriage, male respondents were almost twice as likely to consider an "ability to compromise" important (15.4 percent against just 8.7 percent of women). For more information visit www.ab.acop.com.

Debit cards rapidly becoming payment method of choice

In addition to traditional forms of payment like checks, cash and credit cards, today's consumers have a wealth of options to select from, whether it's using a debit card to buy groceries at the supermarket, driving through the "EZ Pass" lane at a highway toll booth or paying the phone bill online.

With customer behavior changing so rapidly, the banking industry is finding it increasingly vital to identify the primary issues and technologies capable of attracting and retaining consumers while building their core payment strategies, according to a recent study conducted by Unisys Corporation, Global Concepts and Jim Moore of Talson Associates.

As retail payments can represent up to 33 percent of total bank revenues and 40 percent of operating costs, the



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study, entitled "Beyond the Decline of the Check: New Directions in Retail Payments," helps outline best practices and pinpoints both current and future technologies offering banks additional revenue opportunities over the next 12 to 36 months.

According to the overall research, consumers are surprisingly flexible about paying for services or merchandise, and 42 percent of consumers surveyed stated they changed how they made payments last year and 33 percent expect to make changes this year.

Additionally, the study found that various payment methods failed to yield significant return-on-investment (ROI) to-date, yet senior-level banking executives believe the passage of government legislation and introduction of technologies that are easier to use and more convenient for consumers will deliver quicker returns.

Specifically, the survey identified primary issues around which banks are building core payments strategies:

- Check decline — Although checks remain the most popular form of consumer bill payment, the U.S. is witnessing a decline in check volume, holding close to 2 percent decline annually.

- Most large banks are moving or plan to move from centralized to distributed image capture. Though the building blocks for straight-through digital check processing (full truncation) are in place with the Check Clearing for the 21st Century Act (pending legislation that would allow the use of a digital substitute check which would pave the way for easier image-based check processing and full truncation). The study found that even if the bill now before Congress passes this year, market and regulatory barriers still exist, and full truncation will likely take three to five years to evolve.

- Debit card popularity — Debit cards are growing at twice the rate of credit cards and are expected to grow faster than any other method for in-store purchases over the next 24 months.

- While issuer revenue generated from signature debit cards fees is more than four times that of personal iden-

tification number (PIN) debit cards, consumers prefer PIN to signature debit transactions by a 12 percent margin.

- Most large banks are developing payroll cards. Half of consumers now use some form of direct deposit; for those paid in cash or check form, 19 percent would be willing to consider a "wage card."

- Gift and stored-value cards are already widely disbursed by merchants and expected to expand. Banks, however, have captured only a fraction of the business opportunity associated with these new payment options.

- Billers expect direct debits, electronic bill payments and consumers' use of credit cards to pay bills to continue to increase in the next 12 months.

- Fifteen percent of retail bill payment check writing will shift to electronic payments over the next 12 months.

- Electronic point-of-sale (POS) payments should grow substantially over 12 months; 34 percent of cash transactions should shift to cards.

- Online bill payers are, on average, 21 percent more profitable than non-online bill payers. Consumers' interest is still higher among those with easy Internet access.

- While 64 percent of billers have yet to look at offering Web-based bill presentment options, 15 percent are evaluating it, and 7 percent offer it today. More than 80 percent of billers cite improved float, self-service capabilities and cost reduction as EBPP benefits yet three-quarters are still concerned about data security.

"Beyond the Decline of the Check: New Directions in Retail Payments" studied both the supply and demand side of the U.S. payments market. Comprised of both qualitative and quantitative data and analysis conducted in late 2002 and early 2003, the supply-side research involved interviewing more than 100 decision-makers at banks, payment processors, system intermediaries and technology vendors, including representatives from sponsoring organizations ABN AMRO, Bank of America, Comerica, Wachovia, EMC, the Federal Reserve, MasterCard and Microsoft.

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The demand-side study involved market surveys, conducted by the research firm IDC, of major retail payments market stakeholders, including more than 800 retail consumers, 150 high-volume retail bill originators and 100 national retail merchants. See www.unisys.com/financial to download a free white paper summarizing the study.

Customer reward programs not so rewarding

A Maritz Poll reports that while almost half (49 percent) of American adults participate in some form of reward or loyalty program, four out of 10 participants have opted out of at least one program, citing a variety of frustrations from an inability to redeem rewards to having to pay a fee to participate.

According to the Maritz Poll, which surveyed 1,205 adults nationwide, loyalty programs are good for business: 80 percent of the participants do more business with the companies as a direct result of the programs. However, 40 percent of those Americans who participate in reward programs offered by airlines, hotels, restaurants, credit card issuers and retailers have stopped participating in at least one of them.

The poll cited the following reasons why Americans dropped out of a reward program: 46 percent said they didn't like paying a fee; 41 percent didn't feel they were being rewarded

properly; 32 percent had trouble redeeming points; 24 percent said the rules kept changing. Furthermore, 74 percent of those who stopped participating in a reward program said they subsequently buy less from the company that offered it.

Maritz Poll is a national consumer opinion survey conducted periodically by Maritz Research, St. Louis. The online survey, conducted April 7-9, featured responses from 1,205 randomly selected adult participants in an e-mail panel (602 male, 603 female) from throughout the United States. The survey focused on attitudes and issues related to brand loyalty.

The Maritz Poll also reports on the most popular rewards programs consumers participate in: credit cards (29 percent); airlines (24 percent); retail store (13 percent); hotel (13 percent); restaurant (12 percent); online retailer (6 percent); automobile (5 percent); cellular phone (4 percent).

Participants in reward programs were asked why they take part in them. Following is a list of reasons for participation: discounts (60 percent); cash-back (53 percent); free merchandise (42 percent); free travel (41 percent); special benefits or upgrades (33 percent); special "members only" offers (28 percent); gift certificates (28 percent). For more information visit www.maritzpoll.com.

Outdoor advertising growing

The outdoor advertising industry

experienced modest growth in first quarter 2003 overall spending, posting significant gains in the categories of local services and amusements, financial, and automotive, according to figures from the Outdoor Advertising Association of America (OAAA). First quarter netted out at \$1.25 billion, up 2.3 percent versus first quarter 2002.

Outdoor media performance fluctuated across the top 10 advertising categories with local services and amusements the number one spender, remaining strong with 10.1 percent growth. The biggest gain came in the automotive category, which registered a 58.7 percent rise compared to the previous year. Financial also posted a large increase, up 19.3 percent. Insurance and real estate (7.4 percent), automotive accessories (6.1 percent), and media and advertising (6.0 percent) all reported strong gains.

The largest decline continued in the telecommunications category, which dropped 10.4 percent. Restaurants, retail, and public transportation, hotels and resorts were all down approximately 4 percent.

Relative to the overall ad industry recession, outdoor media continues to show resiliency, particularly on a local level, where the medium is strongly employed. Reports from OAAA member companies indicate that second quarter sales have shown buoyancy and that early summer spending is brisk. For more information visit www.oaaa.org.

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Research Industry News

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research associations. This will enable the market research industry globally to speak with one voice and is a major step toward strengthening the position of the market research profession and industry," said Mario van Hamersveld of the European Society for Opinion and Marketing Research (ESOMAR).

By joining the initiatives resulting from the RELEAS process, market research associations will support: the Global Legislative Initiative, an effort aimed at representing the interests of market research at the level of national parliaments and other legislative bodies worldwide; the ongoing effort to review self-regulation practices and develop new quality standards; the initiatives aimed at optimizing the position and role of market research in client companies and the efforts to share best practices through GROW, the industry's Global Research Online Workshop which was established recently.

The leaders of research associations also agreed to join WIN, the World Industry Network. WIN is a flexible platform created as a follow-up to RELEAS which is scheduled to bring together market research associations and business leaders at alternating annual meetings. The inaugural WIN meet-

ing on May 22-23 in Brussels was facilitated by ESOMAR, EFAMRO (the European Federation of Associations of Market Research Organizations) and the ARF.

Awards

Greenwich, Conn.-based **NFO WorldGroup** has been named International Vendor of the Year by TGI Friday's Inc., parent company of T.G.I. Friday's restaurants and a division of Carlson Restaurants Worldwide. NFO WorldGroup has provided business insight to T.G.I. Friday's international division since 1999.

New accounts/projects

Clear Channel Outdoor, a division of **Clear Channel Worldwide**, has selected **Arbitron Inc.**, New York, to supply it with local market consumer information and software services in all U.S. markets served by Clear Channel Outdoor.

Separately, Arbitron Inc. announced that America Online's Radio@ Network has subscribed to, and will now be measured in, Arbitron's Internet Broadcast Ratings.

BankFinancial will use **SPSS Inc.**'s PredictiveMarketing solution to help it acquire and retain customers and

improve marketing efficiency.

New companies/new divisions/ relocations/expansions

Bonnie Sargent has opened **Field Research Services** at 1519 Virginia St., St. Paul, Minn., 55117. Phone 651-489-4567. Fax 651-489-4657.

A new research firm, **African Response**, has opened in Johannesburg, South Africa. Beatrice Kubheka has been named managing director of the firm.

FastChannel Network will open its sixth full-service North American office in late July in Los Angeles.

A new firm, **Advanced Focus**, specializing in recruitment services for qualitative and quantitative focus groups and IDIs, has opened at 330 W. 58th Street, 16 J, New York, N.Y., 10019. Phone 212-217-2000. Fax 212-217-2007. Web www.advancedfocus.com.

Youth research firm **Twentysomething** has opened an office in Mexico. Twentysomething/Mexico is headquartered in Mexico City.

New York-based **Scarborough Research** has launched its Custom Analytics Group, which will specialize in integrating corporate marketing data with Scarborough's consumer research.

Company earnings reports

Revenue for the fourth quarter and fiscal year ended March 31 in the research operations of **Catalina Marketing** decreased approximately 34 percent compared to the fourth quarter of the prior year. For the fiscal year ended March 31, revenue for Catalina Marketing Research Solutions decreased approximately 2 percent from fiscal year 2002. Catalina Marketing Research posted a nominal loss for the quarter and contributed approximately \$0.02 per diluted share for the fiscal year ended March 31.

For the three months ended March 31, New York-based **FIND/SVP** reported net income of \$45,000 as

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compared to a net loss of \$473,000, or (\$0.05) per share, in the comparable quarter of the prior year. This compares favorably to the net loss of \$520,000, or (\$0.05) per share, in the fourth quarter of 2002. Revenues for the quarter improved 1.1 percent to \$5,102,000 as compared to \$5,044,000 in the same quarter in the prior year.

For the three months ended March 31, the company had operating income (income exclusive of interest expense and other income) of \$5,000. These results compare to an operating loss of \$207,000 in the fourth quarter of 2002, and an operating loss of \$674,000 in the comparable quarter of the prior year.

Adjusted EBITDA for the three months ended March 31 was \$322,000 as compared to a loss of \$169,000 in the comparable quarter of the prior year. The company's reported first quarter performance is exclusive of the results of Guideline Research Corporation, which was acquired on April 1.

Paris-based **Ipsos Group's** revenues for first quarter 2003 came in at EUR 118.6 million, up 9.5 percent on the first quarter of 2002. At constant scope and exchange rate, the firm's Q1 revenues rose by 8.6 percent. Ipsos' first quarter revenue performance was driven by contrasting trends in terms of organic growth, changes to the scope of consolidation and exchange rates. The consolidation of companies acquired in 2002 generated 15 percent revenue growth. However, currency effects reduced these revenues by 14 percent when translated in euros. At constant exchange rates, Ipsos' revenues for the first quarter of 2003 were up 22 percent to EUR 134 million.

Over the quarter, most currencies showed much weaker average exchange rates against the euro compared with the first quarter of 2002. This was particularly apparent in Latin America (-43 percent), North America (-23 percent for U.S. dollar and -13.5 percent for Canadian dollar) and the U.K. (-8.5 percent). This downtrend began in spring 2002, but has only a

very limited impact on the Group's margins, as most of its operating expenses are also denominated in local currencies.

Ipsos-ASI, the company that measures the effectiveness of advertising campaigns, achieved record growth. Ipsos also posted a revenue increase in marketing research and customer satisfaction measurement. The media research business returned to slightly positive growth, while opinion research suffered temporarily from an unfavorable basis of comparison, as revenues in early 2002 were boosted by the run-up to the French and Brazilian elections.

A geographical breakdown of the evolutions in activity shows similar trends to 2002. Despite the persistence of a strongly unfavorable impact in exchange rates, North America (41 percent) and Latin America (7 percent) account for almost half of the Group's overall revenues. Europe has seen a steady start to the year and the company foresees continued improvement.

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Product & Service Update

continued from p. 12

contains more than 250 metrics and details how companies allocate resources, develop strategy and conduct effective market research activities. The report contains market research budgets, staffing, strategies and tactics from 17 pharmaceutical companies including Pfizer, AstraZeneca, Eli Lilly, Bristol-Myers Squibb and Aventis.

Data protection software from KOM Networks

Ottawa, Ontario software firm KOM Networks has released version 3.0 of its ShieldWorx data protection software. ShieldWorx does not require any integration efforts on the part of the user to allow applications to take advantage of its data protection capabilities instantly and with no impact upon performance or change in appearance or operations. ShieldWorx converts any online storage resource of any file server into an online archive without impacting existing data. Its benefits enhance management of content, records and documents, e-mail archiving and digital asset management applications. ShieldWorx does not impact the administrator's ability to use business-critical tools such as

encryption and compression. It also does not affect performance. For more information visit www.komnetworks.com.

SPSS debuts Predictive Web Analytics

Chicago-based SPSS Inc. is now offering Predictive Web Analytics, a solution that helps organizations transform their Web data into customer intelligence. Predictive Web Analytics solution integrates the company's new NetGenesis 6.0 Web analytics platform with the predictive modeling capabilities of its Clementine 7.0 data mining workbench.

Predictive Web Analytics provides four analytical capabilities: segmentation of visitors based on their behavior, detection of content and product affinities, automatic identification of the most significant paths taken through a Web site, and prediction of visitors' propensity to purchase, to view particular content or to churn. By providing historical and predictive Web metrics, Predictive Web Analytics identifies opportunities that increase sales and improve customer satisfaction, enabling companies to quantify the return on investment of Web initiatives. For more information visit www.spss.com.

Service copytests multicultural ads

Miami research firm Insights Marketing Group, Inc. has launched Multicultural Diagnostic Research, a new copytesting service geared toward multicultural ads and audiences through an exclusive licensing agreement with Diagnostic Research International (DRI).

The new multicultural copytesting service provides insights into the performance of multicultural advertising in a culturally-sensitive interviewing environment using a proprietary cultural sensitivity assessment. IMG's service will focus on African-American and Hispanic TV, radio and print advertising.

Multicultural Diagnostic Research provides evaluative information for advertising decisions as well as in-depth diagnostics to target areas for revisions and/or refinements for ad optimization.

Based upon DRI's methodology the new multicultural copytesting service provides insights into the performance of multicultural advertising by adding a culturally-sensitive interviewing environment, ethnic group-calibrated norms, and a proprietary cultural sensitivity assessment. For more information visit www.insights-marketing.com.

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Free profile of Hispanic radio listeners from Arbitron

New York-based Arbitron has released the 2003 edition of "Hispanic Radio Today: How America Listens to Radio," its annual update about Hispanic listeners in the U.S. and the formats they prefer. For the first time, the study combines Scarborough consumer data with Arbitron audience data to develop a profile of Hispanic listeners across America.

With Scarborough USA+ information on the purchasing plans and leisure activities for each of the eight most popular radio formats (Spanish-language and English-language) among

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Hispanic listeners, the national study illustrates radio's ability to reach the fast-growing Hispanic consumer market. The number of Hispanics living in the U.S. now accounts for more than 13 percent of the population in Arbitron Metros. Accordingly, more people than ever are listening to Spanish-language radio, and the number of Spanish-language radio stations has increased by more than 100 in the past four years, reaching 664 in 2002.

Mexican Regional is by far the favorite Spanish-language format of Hispanics in the U.S. Spanish Contemporary comes in second, followed by Spanish Tropical as a distant third. Contemporary Hit Radio (CHR) is the favorite English-language format among Hispanic Americans. The study can be downloaded at www.arbitron.com/downloads/hispanicradiotoday03.pdf.

New investor relations research tool

BRANDimension, a research tool for investor relations that incorporates advertising-derived account planning methodologies, has been introduced by S2 Communications LLC, a New York-based business and communications strategy consulting firm.

BRANDimension looks at constituencies beyond the financial community, including "C-Suite" executives at customers, prospects and peers as well as the client's own key employees. This audience perspective, combined with S2's proprietary account planning techniques, is designed to give investor relations officers meaningful and useful insights.

BRANDimension enables investor relations officers to: develop positioning and messages that affect investment behavior; establish metrics that more accurately evaluate the effectiveness of the IR program; identify promising directions for investor relations strategy; ensure consistent messaging and facilitate integration across communications disciplines.

For more information visit www.s2branding.com.

Collect data via wireless Web and SMS

Dallas-based Mobile Memoir has developed software for conducting market research using the wireless Web and SMS (short messaging service) as data collection tools in North America. The text-based wireless survey and diary solution exchanges information using mobile phones and connected PDAs. Mobile Memoir's Web-based software enables a market researcher to design a survey, upload it for availability by mobile phones in any part of the world, and receive and analyze results in real time. It offers the most popular features and functions available in Internet survey solutions, including support for all question types, branching, piping, respondent tracking, messaging with respondents (via mobile phone or the Web), and availability of instantaneous downloadable reports.

A primary application for Mobile Memoir is the replacement of traditional diary-keeping methods with data entry on a mobile phone, a device that is always with the consumer. Other applications include mystery shopping, consumption studies, clinical trials in which patients need to report side effects of medication in a timely fashion, and immediate ad hoc surveys and opinion polls conducted in nontraditional settings. For more information contact Leslie Townsend at 512-342-2330 or visit www.mobilememoir.com.

Craft kid media campaigns with MultiMedia Mentor Junior

Menlo Park, Calif.-based Knowledge Networks/SRI has launched MultiMedia Mentor Junior, a media research tool designed to help advertisers, agencies, and content providers find the best ways to combine media in campaigns targeting kids.

As the exclusive ratings provider for Radio Disney, the firm developed techniques and questionnaires designed to encourage kid cooperation and alleviate parental concerns. The MultiMedia Mentor Junior pilot — sponsored by Radio Disney and Starcom Worldwide — is based on some 750 firsthand interviews with children aged six to 11. The result is a resource containing insights about: how to reach kids who consume more sodas or go to more movies; which media and/or dayparts may be undervalued in terms of their child audiences; and whether specific non-media activities might offer valuable tie-ins with media campaigns.

Knowledge Networks analysis reveals insights that can boost the efficiency of kid-focused media campaigns. For example: boys' media use is heavily concentrated in TV, while girls generally divide their time more evenly among the five media studied; children with cable-connected TV sets in their rooms spend an additional 1.25 hours with television every day, compared to kids with no in-room sets; girls nine to 11 are the most prolific media multitaskers, combining TV and Internet, TV and radio, and other vehicles more often than boys or younger girls; boys six to 11 who spend 90 minutes or more a day playing videogames also watch an extra 25 minutes of TV daily; and girls nine to 11 who watch relatively little television spend nearly half (46 percent) of their media time with magazines and the Internet.

MultiMedia Mentor Junior combines twice-yearly surveys in which kids six to 11 report on their exposure to five key media — TV, radio, Internet, magazine and newspapers, and analytical software that allows users to develop media allocation strategies focusing on specific demographic groups, product users and other audiences. For more information visit www.knowledgenetworks.com.

Briefly...

Arlington, Texas-based Decision Analyst, Inc. has launched the **Medical Advisory Board**, adding to its line of specialty online panels. The Board will draw its membership from all areas of the health care industry and all types of medical practice. Members will be

given the opportunity to participate in a range of online opinion surveys and exchange their specialized knowledge with fellow members in online discussion sessions.

InterClipper has launched ViC CD (formerly VideoMarker), which allows the **capture of qualitative research projects on CD** instead of tape. With three levels of service — ViC Viewer, ViC Clipper and ViC Marker — ViC CD is available in 80 facilities nationwide. InterClipper also offers a videotape-to-CD transfer service. For more information visit www.interclipper.com.

Western Wats, Provo, Utah, has opened a **150-station data collection facility** in Lethbridge, Alberta. The firm has contracted with SPSS MR to enable 50 stations to run Quancept 7.8 using a QTS dialer.

San Antonio-Texas based GlobalSCAPE is now offering the **Web Survey questionnaire development product**. Web Survey for Windows includes everything needed to create questionnaires and analyze their results. Users can develop presentations with the information they have acquired, which can be saved in common formats such as Microsoft Word, PowerPoint and HTML. For more information visit www.globalscape.com/download/websurvey/.

“Black Americans: A Statistical Source Book 2003” and **“Hispanic Americans: A Statistical Source Book 2003”** are available from Information Publications, Palo Alto, Calif. Each book contains sections on social and economic characteristics; demographics; education; crime and corrections; vital statistics and health; and earnings, income, poverty and wealth. For more information visit www.informationpublications.com.

ICT Research Services, the marketing research business unit of ICT Group, Inc., has opened a **new call center in Woodstock, Ontario**. The center will house 150-170 stations, each with CATI and predictive dialing. For more information visit www.ictgroup.com.

Tenafly, N.J.-based research firm Invoke Solutions, Inc. is now offering **Dynamic Survey 2.5**, a marketing research solution that enables qualita-

tive and quantitative techniques to be combined in a live Web session with a large national sample. The latest version of the solution provides dashboard improvements, technology enhancements and increased flexibility. For more information visit www.invoke.com.

Online information source MarketResearch.com has launched **Version 3.0 of its site**, with enhancements designed to make locating relevant business intelligence easier. The new site, based on client feedback and testing, has been redesigned with more intuitive navigation, additional browse features and new search functionality.

MapInfo Corporation, Troy, N.Y., has **enhanced its AnySite location-based software tool** to help users make informed decisions regarding site location, target marketing and product merchandising in both the U.S. and Canada. The mapping and reporting capabilities allow companies to connect to, retrieve and report both MapInfo data and proprietary customer databases in order to analyze trade area data. New enhancements to MapInfo AnySite include predictive analytic modules and demographic updates including Census 2000. For more information visit www.anysite.com.

The Radio Advertising Effectiveness Lab (RAEL) is now offering a second

white paper, **“The Multiplier Effect—Estimating The Benefit of Adding Radio,”** on its Web site at www.radioadlab.org/whitepapers.htm as part of a series of white papers and advertiser case studies. RAEL, an independent organization established in 2001 and funded by radio industry companies, works to measure radio's effectiveness and to increase advertiser and agency confidence in radio.

Dallas research firm Parks Associates is offering a **free white paper on U.S. mobile phone users**. Titled “Disconnected: Consumers and the Mobile Phone Industry,” it can be downloaded from www.parksassociates.com.

Nielsen//NetRatings is now offering **AdRelevance 4.0**, featuring improvements designed to equip advertising and media buying and selling communities with new tracking tools to measure and research online advertising campaigns. New features include cross-media spending analysis, keyword search measurement, additional rich media and ad format tracking, and precision probing for registered areas and sub-sites. For more information visit www.netratings.com.

New York-based research firm Ziment announced that its **online panel of patients suffering from a wide range of chronic illnesses** now exceeds 200,000 members.

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Software Review

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Templates for the look and feel of the survey work in a similar way, but tellingly, I could not find a feature to switch off the blatant hyperlinked plug for the manufacturer that appeared at the bottom of every page of my survey.

Seamless integration with the Web

There is a useful choice of built-in question types for handling most types of data, including ratings and grids, and you can choose whether you want all questions to be on one scrolling screen (the default) or on separate screens, or any combination, simply by adding so-called page breaks. Page breaks play a crucial role in achieving routing or skip logic, and while there is a lot of flexibility in the kinds of conditions you can set, it was not easy to understand the routing structure once you had created it, which would make writing a compli-

cated screener section difficult and modifying it later positively treacherous.

The program supports multiple languages, though entering them was a seriously tedious cut-and-paste process with no easy import route.

Publishing a survey could not be easier, and here the integration between the desktop tool and the hosted service on the Web works very smoothly. There is an adequate built-in tool for generating personalized e-mail invitations, including some basic authentication methods on query strings or cookies, but no password protection as yet. In addition to WebSurveyor's hosted service, for which you pay according to several volume-based thresholds, you can pay for an enterprise solution and run the surveys on your own Web server.

The program runs out of steam on the analysis side. The latest version (4.1) adds much needed support for producing summary statistics on numeric and scale questions, and there

is the standard gallery of chart views, plus one kind of crosstab. For new users, it is nice that the analysis pops open with a ready-made report showing a chart for every question. But only being able to view each question once, either as a chart or a table, soon becomes a frustration. For serious work, you would need to export the data out to SPSS (which is relatively painless) or something else, which is more hit-and-miss.

Rich in features

Overall, the program is surprisingly rich in features. Its simple, uncluttered interface keeps sneaking in options for the power user on buttons and tabs marked "advanced" and on right-click menus. But these only go so far: advanced capabilities — like introducing randomization at a question level, prioritized selection, and using logic to remove inapplicable answers from questions — are not supported. Neither is quota control, which is surprising. While the documentation is very limited, its manufacturers deserve praise for the informative materials placed on its Web site to encourage good practice in survey design and execution.

Steve Johnson, vice president at Pragmatic Marketing in Scottsdale, Ariz., uses WebSurveyor for an annual market measurement and benchmarking study that the firm uses in its consulting activities with its largely high-tech customer base, as well as to do more general research among its customers. "I am not a researcher, so what I really appreciate is that this handles all of the mechanics, so I can focus on my survey and my answers," Johnson says. "When I started using it, I was astounded by how simple it was. And over the years the program has gotten more capabilities that make the product increasingly powerful, but without making it any more difficult."

Johnson contrasted the drawn-out research projects he used to commission 10 years ago for upwards of \$50,000 with those he can field for a few hundred dollars using WebSurveyor. "The amazing thing about being Web based is that I can get the answers in three days, and

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Cons

- lumpy interface
- cryptic documentation
- terminology confusing in places

quickly share the experience. It takes about a minute to post the results for others to look at.”

Surveywriter: the can-do program worth getting to know

Surveywriter is delivered entirely as a Web-based service or ASP, so you log on to the company’s Web site and create your surveys there. There are many ASP-based Web interviewing tools now, but Surveywriter is particularly interesting for the balance it strikes between reasonable ease of use and advanced capabilities.

Because it is Web-based, the performance you enjoy or suffer will partly rely on the speed of your Internet connection and the vagaries of bandwidth contention. Surveywriter uses the same server for survey design and live survey hosting, and understandably gives priority to respondents online. At peak times, this could also mean sluggish performance for you when writing your questions. With an open Internet connection required at all times, you won’t be able work on your survey on your laptop on the plane or in the departure lounge (unless you are sitting in a wireless hotspot).

Finding your way around the program may be a little daunting at first. The basic act of creating a new question or editing an existing one relies on moving in and out of a lot of different pop-up windows, some of which have a Microsoft Word-like look and feel. But at each stage, it is

easy to preview exactly how each question will look on-screen.

The program considers each question to be on a separate screen, unless you take steps to group questions together into a so-called “merge question.” There are some very sophisticated question types that allow you to do some standard survey activities, such as the one to present awareness or usage questions and then ask follow-up questions only on those mentioned (or not mentioned). These go by the curious name of “piping” and “regressive piping” in the tool, which can be forgiven as they make a tedious programming task into a very simple one.

In all, there is little that has been overlooked in supporting advanced survey design. There is built-in support for quota checking and for screening and terminating interviews part way through. Standard message screens handle each of these eventualities, which you can customize on a survey or on an entire account basis. And since you can set up multiple accounts at no extra charge, and link the accounts together, you could use this to create different strategies for different client groups. Templating also works at both a survey or an account level, and there are seemingly endless capabilities in presentation options.

Maximum security

The suite offers a range of security features to keep bounty-hunting respondents at bay. This includes excellent, integrated capabilities for generating personalized e-mail invitations containing click-through links or password information. If you do not wish to upload your sample to the ASP’s server, and prefer to do a mail-merge directly from your own database, the program will helpfully generate unique passcodes or PINs on

demand, which you can download. Use them with your own mail-merge or database and you will still have security and traceability in your research.

Translating surveys into multiple languages is also well supported, with the ability to spin out all the English text into an Excel spreadsheet for the translator to work on offline and simply to re-import all the translated text.

For really advanced users, there is even the facility to write your own Java applets between questions, to interrogate or update other databases in real time or perform other non-supported activities.

The program works on the Internet principal that it is free to use, until you need to do something useful, which in this case means to collect responses. Here, you pay only for completes. This fee structure also gives you access to some basic online reporting, but for an extra fee you can spot-purchase access to a more advanced analytical module on a survey-by-survey basis. Yet, for such a vast and comprehensive system, its documentation does not appear to do it justice and also lacks good examples. A better manual would certainly result in fewer support calls to the supplier.

David Taber runs his own research business, Taber Analytics, in San Francisco. He was initially a little unnerved by the prospect of placing precious and often confidential data in the hands of a total stranger, yet he reports no problems to date. “It is very reliable and robust,” he says. “I have just received 1,200 completes on one study and I don’t think I had a single e-mail saying the survey did not work. I’d normally expect about 1 percent to report some problems.”

Taber had worked his way through several similar packages, each time running up against limitations, before finding Surveywriter a year ago. “I tried a project with it and it worked pretty well. I spoke to their technical guy, asked some difficult questions and he seemed willing to get his hands dirty. It has been a great choice for me. It provides a good level of power, given how much it is costing you.” *TM*

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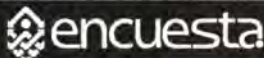
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104. Designing Effective Questionnaires: A Step by Step Workshop

New York.....Jan 14-16	Chicago Aug 5-7
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106. Fundamentals of Internet Marketing Research Methods

Las Vegas.....Mar 18-19	Chicago Nov 13-14
New York.....July 22-23	

201. Getting the Most Out of Traditional & Online Qualitative Research

Chicago.....May 6-7	Las Vegas Oct 16-17
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202. Focus Group Moderator Training

Cincinnati.....Jan 21-24	Cincinnati July 8-11
Cincinnati.....Mar 25-28	Cincinnati Aug 26-29
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203. Specialized Moderator Skills for Qualitative Research Applications

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205. Qualitative Research with Children

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301. Writing and Presenting Actionable Marketing Research Reports

Baltimore.....Feb 26-28	Chicago Sept 17-19
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401. Managing Marketing Research to Enhance Accountability and ROI

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501. Applications of Marketing Research

New York.....Jan 9-10	Chicago Sept 11-12
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502. Product & Service Research

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504. Advertising Research

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505. Market Segmentation Research

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506. Customer Satisfaction Research

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507. Analysis and Interpretation of Customer Satisfaction Data

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508. Positioning Research

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601. Data Analysis for Marketing Research: The Fundamentals

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603. Practical Multivariate Analysis

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604. Advanced Analytical Workshop: A Hands-on Approach to Multivariate Analysis

Cincinnati.....Apr 8-10	Cincinnati Oct 13-15
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605. Practical Conjoint Analysis and Discrete Choice Modeling

New York.....Feb 11-12	San Francisco Oct 23-24
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701. Conducting Research in International Markets

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Qualitatively Speaking

continued from p. 16

market research can help?" The process of interpreting results appears so easy that often colleagues who observe focus group sessions feel comfortable communicating their opinions and personal conclusions to others outside the project team before reconciling them with the more experienced and unbiased conclusions of the focus group moderator — seriously compromising project integrity.

Who is the project director?

Because of the tendency business people have to short-circuit the focus group process, the market research project director on the client side must make a special effort to protect it. However, not all organizations have market research departments, so you may be wondering in such situations who the market research project director would be, or if one is necessary.

In order for market research to be effective, someone in the client/sponsor organization must take responsibility for the focus group project. An external research consultant can be brought in to guide the process of translating business needs into focus group objectives, hire experienced research professionals to recruit respondents, moderate, and report results. But only someone representing the company can ensure that the project team is staffed with appropriate company representatives and that these company representatives employ research results to improve business decisions, actions and strategies. The market research project director on the client side is the "point person" for all company questions about the project. He/she is responsible for seeing that colleagues participating in the project understand what is expected of them, and for coordinating and monitoring all activities that are required from his/her company. In the best of all worlds, a market researcher within the company would work with the project sponsor to carry out these responsibilities. But when that isn't possible, a marketing professional, the project sponsor or other individual within the business

who has a vested interest in the project should take on the responsibilities of the market research project director.

What can project directors do to ensure project effectiveness? Here are some tips.

- Ensure that focus groups are an appropriate research methodology.

When businesspeople initiate a request for market research by stating they need focus groups, they are specifying the research methodology, not stating their business or research needs. They have skipped the entire project initiation phase of the research process which establishes business requirements and documents how market research is expected to help. Focus groups may not be able to provide the information needed. So the first thing the project director should do is work with the research requestor to establish the business issues and goals that are prompting the market research request, as well as the expectations of how the research is expected to help. Once that is accomplished the research project director can determine whether focus groups are an appropriate methodology. (If the project director is not a trained market research professional he/she will have to work with a market research consultant to make this determination.)

Note: If it is determined that focus groups are not appropriate, the market research project director will have to inform the requestor and suggest alternative research methodologies. The project director should be prepared for some resistance, because the requestor is being asked to consider a methodology that may not be as comfortable and/or as immediately gratifying as focus groups.

- Review the focus group process with project team members — don't assume they already know it.

If focus groups are deemed an appropriate methodology, the project director should review the focus group process with the requestor and project team members. The project director should highlight each team member's role in the process, and discuss the types of information that can be obtained, as well as the types that cannot. Focus group design is not as sim-

ple as it appears, and often colleagues are not as involved as they should be in developing focus group objectives, defining participant characteristics, reviewing discussion guides and creating handouts and presentation aids.

- Establish the importance of maintaining the integrity of results.

Discuss the obligation that each team member has to assure that no one interprets or communicates results until they have read and understood the moderator's final report. Point out to team members that the most dangerous aspect of focus group research is that project integrity can be compromised and inappropriate corporate actions taken if someone other than the moderator attempts to draw research conclusions and/or communicate what transpired in the groups. Explain that as members of the project team they have a responsibility to ensure the integrity of research results.

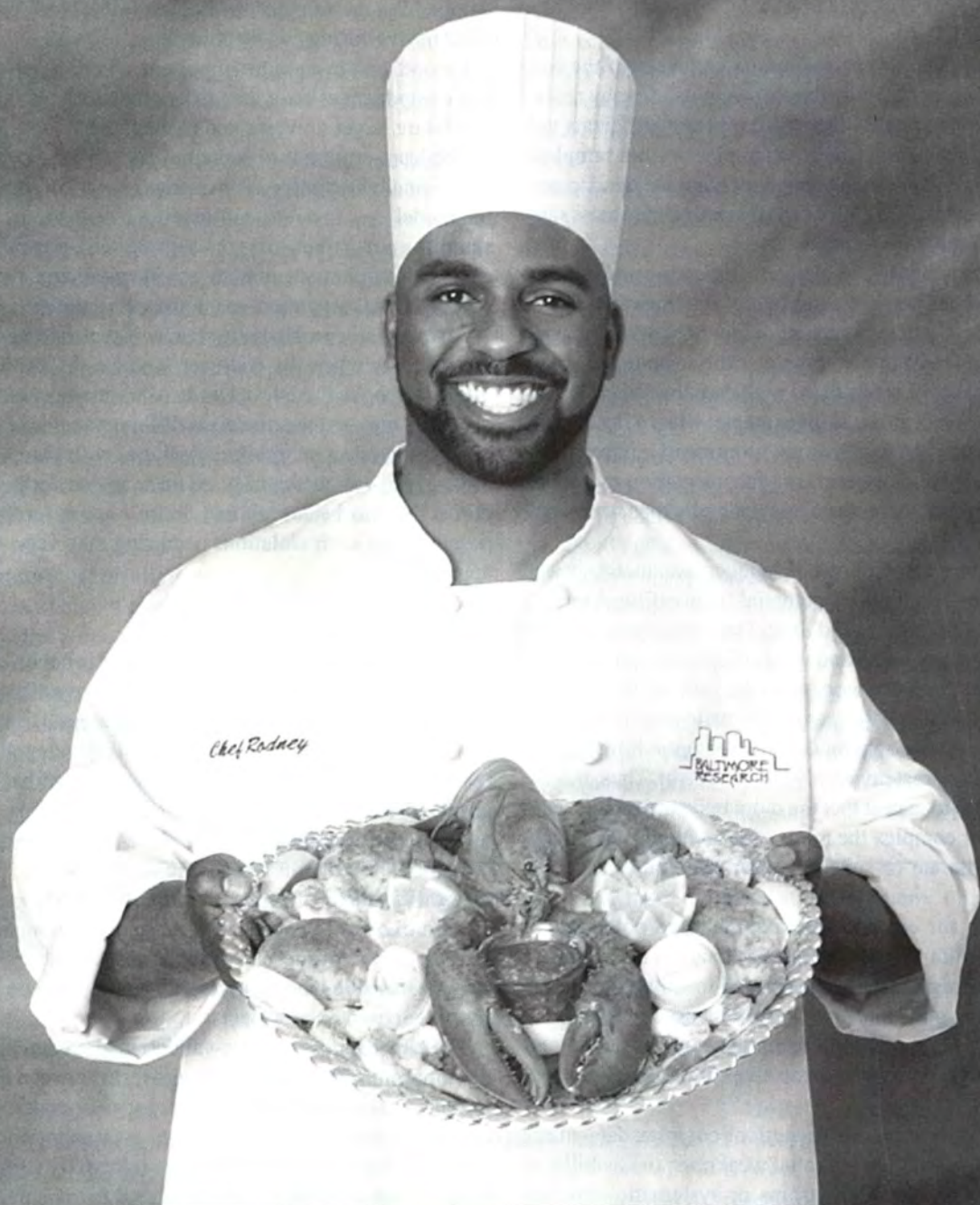
It is very important to impress upon team members that they are also responsible for seeing that anyone they invite to observe focus groups also understands this obligation.

- Develop observer guidelines to distribute at each focus group session.

Prior to each focus group session, spend five minutes reviewing observer guidelines with all observers. Emphasize each observer's obligation to refrain from communicating what is observed at focus group sessions until he/she has read and understood the moderator's final report. Because failure to carry out this obligation jeopardizes the effectiveness of the entire focus group project, it is appropriate to circulate a form for each observer to sign to acknowledge his/her obligation.

Channel the energy

The focus group methodology generates enthusiasm among client sponsors and business associates, and brings them a three-dimensional customer perspective. Knowing how to channel the energy and sense of urgency surrounding most focus group projects can make a huge difference in the payoff to the client organization. *TM*



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Data Use

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this has the effect of decreasing the variances of the estimated model coefficient values or weights, thereby reducing the likelihood of the estimated model coefficients values varying substantially across samples or from sample to the population. Thus, such predictive techniques tend to generate parameter values (or effects) that are stable across samples or are otherwise reliable.

This is not to imply that classical regression and logit are necessarily better at predicting future outcomes than are the nonparametric methods such as neural networks. In fact, a glaring disadvantage of the parametric techniques is that they are inflexible when faced with data that diverge from the model specification, as for example, when a linear specification is used on data that are prominently, intrinsically and unexpectedly nonlinear. In such a situation regression or logit would likely perform less optimally than neural networks.

Furthermore, all modeling techniques, parametric as well as nonparametric, have the potential for overfitting, including classical regression and logit. However, the more simple or less complex the model specification (in the absence of any knowledge or theory as to the form of the relationship to the contrary), the less problematic overfitting tends to be. This is because a model is based upon limited sample information that invariably contains error. Thus, it is not unreasonable to expect that the more unrestrained the technique and/or complex the model, the greater is the tendency to incorporate or subsume such error into the model itself.

Consider, for example, the comparative potential for overfitting with linear regression versus neural networks. Since linear regression is constrained to fitting the data in a straight line only, it is less likely to incorporate sampling error than a more powerful technique such as neural networks, which can contort themselves into extremely complex forms.

Paradoxically then, the strength of complex data-fitting techniques is also their potential weakness: the inability to differentiate actual relationships or systematic structure from random perturbations in the sample. Thus, a trade-off exists between fitting the data with an ever-higher degree of exactitude and the confidence one can have in the closeness of the fit.

Given this potential for overfitting, what steps can be taken to decrease its likelihood? One obvious step is to increase the size of the sample on which the model is built. In fact, the ultimate theoretical solution to sample-error overfitting would be to use the entire universe or population. There would then be no such error with which to overfit, so regardless of how close our model came to fitting the observed data, without error the issue of sample-based overfitting is moot.

In many if not most applications, however, increasing the size of the sample, let alone to the size of the universe, is

simply not feasible. And for a model of even moderate complexity, the sample size needed to decrease the likelihood of overfitting can be quite large.

Second, and even more important, sampling error is but one component of error that differentiates our sample from our future target universe and in many instances may well be the least-pronounced source of such error. Several factors — including unforeseen changes not incorporated into the model — can occur, introducing a new source of non-sampling error that a larger sample will not protect us against. In addition there is always inherent, non-systematic random variation present even in the population.

An especially problematic source of such extra-sampling error occurs when the end-user violates the assumptions under which the model was built. Marketing personnel, for example, may use the model on different audiences, with a different product or product options, with different creatives, and with different price lines and so forth. Thus, a model that has been built that doesn't allow for the likely possibility of such violations occurring may very well disappoint.

Alternative steps

Since increasing the size of the sample is not always feasible, or even effective, in addressing the overfitting problem, what additional and/or alternative steps can we take? Cross-validation, in which the model is developed on half the sample and tested or validated on the other half, is frequently used as a reliability check in model building. Known as "split-half" validation, this method, or some variation of it, can be effective in remedying the overfitting problem when the source of error is primarily if not exclusively sampling error. However, when substantial amounts of non-sampling error are present, a model can give the appearance of being reliable when cross-validated, but still be ineffective when used on new data.

The effectiveness of cross-validation procedures can also be compromised by going back and forth between the training and validation samples subsequent to making model changes for the purpose of achieving a maximally acceptable fit in both samples. The more frequently this process is replicated, the greater the likelihood that the model will be an artifact of random variation and the less likely it is to predict beyond the two samples. This problem is especially acute when many predictors are available with which to model.

Since the tendency to overfit varies both within and between each of the respective modeling techniques, in the final analysis the best safeguard against its more egregious manifestations is an awareness or sensitivity on the part of the person building the model. This would include a knowledge of which technique or class of techniques, parametric or nonparametric, is the most appropriate for any given application, as for example one containing many sources of potential error, sampling and nonsampling, versus one where only sampling errors are likely to be present.

Likewise, a knowledge of the options available to limit

the likelihood of overfitting within each of the respective techniques is also important. For example, with neural networks, analysts can limit the number of "input" and "hidden" nodes used in addition to the number of "training epochs," all of which have the effect of reducing the complexity of the model.


Regardless of the technique one chooses to use in a given application, there are compelling reasons to adhere to the law of parsimony or the "simpler is better" maxim. Simple or less complex models have a greater capacity not only to be flexible in terms of their relationship to sampling error, but also to withstand any external shocks or unanticipated sources of error, relative to models that are tightly built around the sample data. The best approach to building a viable prediction model, therefore, is to obtain the closest fit to the sample data without over-specializing. Thus, our model should be just complex enough to provide a good fit to the data, but at the same time be flexible enough to allow for nonstructural or non-systematic error variance.

Explanatory vs. predictive

Our discussion of overfitting thus far has focused exclusively on the issue of reliability, or on how well model predictions hold up. There is another area where overfitting is an issue, and that is when models are developed for explanatory rather than for predictive purposes. Whereas predictive models are designed to predict future values of the dependent variable given known values of the predictor variables, explanatory (or interpretive) models are developed to gain insight into the interrelationships existing among the

predictor variables as they relate to the dependent variable. A model developed by marketing research to determine how selected variables relate to product purchase is an example of an explanatory model, while a model designed to save mailing costs by predicting which customers on a file are most likely to respond is an example of a predictive model.

These two purposes or goals are by no means mutually exclusive, however there are certain constraints or assumptions attached to interpretive or explanatory type models that are not required of a predictive model, the first being that the model be correctly or at least reasonably well specified. This means that there should be some knowledge of which variables belong in the model, either based on *a priori* theory or intuition or perhaps discovered empirically after a judicious/insightful examination of the data via the use of OLAP, standard EDA, or certain data mining EDA software modules. If such knowledge is lacking, then the model effects or coefficient values to one degree or another may be biased and thus spurious relationships may well result.

In addition, explanatory models should be at a sufficient level of simplicity to allow for comprehensibility, since highly complex models are by their very nature non-interpretable. An overfit explanatory model thus captures too many nuances in the data or otherwise embodies excessive, confusing detail which prevents us from discerning the essence in the data. Or, to borrow from Lotfi Zadeh, creator of the concept of fuzzy logic, "As complexity arises, precise statements lose meaning, and meaningful statements lose precision." 

Names of Note

continued from p. 10

U.K.-based research software firm *Pulse Train* has named **Richard Collins** sales manager.

Cincinnati-based *MRSI* (Marketing Research Services Inc.) has added four new employees, naming **Nicole Bodnar** senior project director, **Christina Jansing** field coordinator, **Tom Spindler** scriptwriter, and **Karina Barrantes** part-time panel coordinator.

Kelly Williams has joined *Focus Pointe* as a project manager at the company's headquarters in Philadelphia.

Kim Kwiatkowski has joined New York research firm *Advanced Focus* as executive vice president. In addition, **Debrah Galimidi** has been named project director and

Todd Biederman has been named president.

Loh Kah Huey has joined *TNS* as a project manager within the Regional Healthcare Team. Kah Huey will be based in Singapore.

Michael Schiller has joined Akron, Ohio-based *DecisionPoint Marketing & Research* as company partner and co-owner.



Schiller

Schmitt

Daniel Schmitt has joined *ICT Research Services* as director of

sales at the company's headquarters in Newtown, Pa.

Bellomy Research Inc., Winston-Salem, N.C., has named **Lynn Dube** director - client services.

Holly Burnette has been named field coordinator at *The Matrix Group, Inc.*, a Lexington, Ky., research firm. In addition, **Natalie Hagen** has been named account coordinator.

Indianapolis-based *Walker Information* has promoted the following associates within the client service department: **Valory Myers** and **Gary Szeszycki** to director 3, **Chris Gogis** to director 2, **Lauri Jones** to director 1, and **Kristen Larsen** to project director 2. In addition, Walker Information has hired the following associates as project directors: **Kelly Kuroiwa**, **Beth Toon** and **Kelly Hughes**.

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Trade Talk

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who concluded his presentation by saying that the company wouldn't be where it is today without research. As product life cycles grow shorter, Palm needs timely information to keep pace with technological changes and evolving customer needs. That data comes from concept testing, pricing studies, customer satisfaction surveys, early-buyer research and segmentation analysis.



Not-so-gold?

It was with great interest that I read the article in the June issue by Tom Greenbaum ["The gold standard?"] on in-person or traditional focus groups.

He compares them rather broadly to other methodologies used in qualitative research like the mini-group, Internet focus group, telephone focus group, in-depth interview and ethnography. While I understand the case he makes about the viability of traditional focus groups, in his definitions of telephone focus groups, the facts and methodology were not fully or accurately represented. Thus I feel compelled to provide a more definitive view of telephone focus groups so that people can truly make informed decisions about the best research method for any given situation.

Greenbaum's definition in the article was that a telephone focus group consists of "a simultaneous conference call among five to 10 people that is monitored by a moderator who is charged with directing the discussion among the participants. Participants can be in any location to participate in telephone focus groups."

Greenbaum mischaracterizes the role of the moderator in telephone focus groups. Far from monitoring and directing (as Greenbaum states it), most telephone focus group moderators are fully trained qualitative researchers who are among the most experienced members of the Qualitative Research Consultants Association. They have years of experience working with clients on honing the objectives of the research, helping to define the target participant audience, deciding on the particular research design, and developing the interview guide jointly with the client and client's team. Most importantly, the moderator takes just as active a role as they would in a traditional focus group. Questions are asked by the moderator and answers are probed, expanded upon, tested, laddered, summarized and sometimes fed back for further depth and understanding. State-of-the-art conferencing technology allows for clients to participate in a one-way-audio mirrored room and pass notes to the moderator. Most qualitative techniques and applications including projectives, ideation, brainstorming, mind mapping, concept testing and product development can be done in a

Indispensable

In order to (re)establish the value of the research function, those who perform it need to make themselves indispensable. How? By demonstrating the power and worth of data analysis. By showing end-clients new ways to think about and use research findings. By finding creative ways to answer tough questions or probe the opinions of untapped audiences.

Those are tall orders. But the MRA conference offered ample proof that they are not insurmountable. **TM**

telephone focus group.

Encouraging interaction, ensuring that all participants are engaged and contributing is one of the major pieces of conducting successful research. While the visual cues are not present in telephone focus groups as they are in a face-to-face group, in a telephone group the moderator listens for audio cues. Silence, giggles, sighs, the amount of time between responses all mean something in the telephone focus group milieu. A skilled telephone focus group moderator uses a host of interpersonal skills to probe beyond first or top-line answers to find out whether a particular point of view represents the thinking of the group or is an isolated opinion. In addition, since the physical distractions and side conversations of in-person groups are not present, the telephone focus group elicits deeper and higher-quality responses.

A major advantage of the telephone focus group is the psychological safety that is created by the fact that participants are in their own comfortable environment rather than an alien setting. They are also free from the impact of other participants' facial expressions and physical gestures, which can sometimes seem intimidating and serve to inhibit response.

In fact, telephone focus groups may be a preferred choice in sensitive situations where participant anonymity is important. It is also a good choice when one is working with difficult-to-reach respondents like executives or physicians.

For more information please see the article written by George Silverman, inventor of the telephone focus group, at www.mnav.com/phonefoc.htm. There are also several articles about understanding and using telephone focus groups and how they compare to other research methodologies.

To borrow from Greenbaum's article, conducting telephone groups is both an art and a science. In my opinion, the art is in the expression of the true voice of the respondents. The science is in the full application and use of all that we do as market researchers.

Eve Zukergood
CEO
Market Navigation Inc.



Trade Talk

By Joseph Rydholm, *Quirk's* editor

Collecting data isn't enough

The lesson from the annual Marketing Research Association (MRA) gathering in June was familiar, one that's been the subject of myriad previous industry events but in these times of woe seems even more relevant: researchers need to go beyond mere data collection.

As various presenters at the San Francisco conference made clear, research is facing an assault on two fronts. Shrinking corporate budgets are making it harder and harder for some to justify spending money on squishy things like research ("There's no ROI!" the nabobs cry). And the proliferation of mechanisms for Web-based DIY data gathering (I can't bring myself to call it research) has made many a middle manager think that ANYONE can do marketing research.

What can be done to stem the tide? Some answers emerged during a stimulating panel discussion on the state of the marketing research industry. Moderated by Jon Last of The Golf Digest Companies, the panel included Melinda Denton, director of marketing research at Wells Fargo Bank; industry veteran Doss Struse; and Marc Dresner of RFL Communications.

Struse put a positive spin on the rise of DIY data gathering by pointing out that the phenomenon proves there is a hunger for information within companies. In some cases, the data seekers may be in departments or industries that aren't commonly thought of as consumers of research, a fact which offers both client-company researchers and those on the provider side new markets for their services. And new audiences mean fresh opportunities to demonstrate the value of research.

To keep the MR function relevant, data gathering must be paired with analysis, Dresner said. He cited management consultants as the biggest threat to traditional researchers because many of them conduct research *and* add their own insights, in contrast to some researchers, whether internal or

external, who still just want to be data providers.

Denton also stressed the value of analysis, citing the example of a highly-regarded moderator once hired by Wells Fargo who did a nice job during the focus groups but then failed to make any recommendations in her report. (I bet she wasn't asked back.) Happily, Denton has found a growing interest among research vendors in providing analysis.

Alive and kicking

Other sessions made it clear that MR is still alive and kicking and that great things can happen in companies and organizations that appreciate the research function.

John Marks, president of the San Francisco Convention and Visitors Bureau (SFCVB), detailed the many ways the Bureau uses research and singled out the yeoman's work of David Bratton, the organization's marketing research manager.

The SFCVB samples the opinions of a range of audiences — from local residents (who are asked what kinds of things their visiting friends and relatives, or VFRs, like to do when they come to the city) to hotel guests and users of SFCVB's Web site — employing a wide array of methodologies including focus groups, mail panels, phone surveys and online research.

Research has given the Bureau more focused and effective marketing efforts, improved its PR, and led to stronger cooperative relationships with corporate partners, Marks said. In fact, one of the most valuable uses of research has been demonstrating the value of affinity programs and other co-branding efforts to the Bureau's various corporate partners. (Success in this area has gotten Marks in hot water with other visitors bureaus, who are now being asked by their respective corporate partners for the same deliverable!)

More positivity flowed from Michael Buhr of Palm, Inc.,

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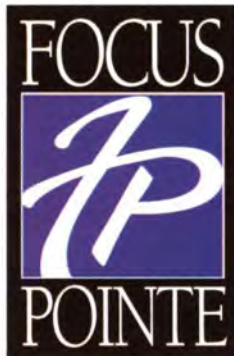
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