

Q QUIRK'S

Marketing Research Review

JANUARY 2004

Mystery shopping issue

- > Implementing your mystery shopping program
- > A look at Audithost mystery shopping software

Online research

- > Does speed kill the data?
- > Can you recruit physicians via fax?

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Atlanta is the cell phone leader

A study by New York-based Scarborough Research shows that Atlanta leads the nation in cell phone penetration. Three-quarters of households there subscribe to cellular phone service. Following closely behind are Detroit (74 percent); and Austin, Texas, Washington, D.C., and Miami (72 percent each). The U.S. markets with the lowest cell phone penetration are Charleston, W.Va. (47 percent), Wilkes-Barre, Pa. (52 percent), Buffalo, N.Y. (53 percent), Syracuse, N.Y. (54 percent) and Lexington, Ky. (55 percent).

The study also demonstrated that two-thirds (66 percent) of households nationally own cell phones and these

experienced a significant amount of growth in the past three years. Nevertheless, the existing disparities in cell phone penetration from one local market to another underscore the fact that marketing cell phone products and services remains a local market issue," says Bob Cohen, president, Scarborough Research. "Understanding consumers where they live — from their lifestyles and attitudes to retail behavior and local media usage — can help wireless services marketers foster enduring brand loyalty with customers."

The Scarborough study found that 10 percent of cell phone subscribers nationally plan to switch their household cellular plan in the next 12 months. The top local market for switching is Detroit, where 18 percent of consumers said they will seek to change plans in the next year.

Cell phone subscribers are also well-wired at home, according to Scarborough. These consumers are 23 percent more likely than adults nationally to have a broadband Internet connection. Those who do not already have broadband are 20 percent more likely to plan to upgrade to it. Cell phone subscribers are 14 percent more likely to have digital cable, 12 percent more likely to subscribe to premium cable channels, and 8 percent more likely to have a satellite television subscription.

Cell phone ownership is defined as Scarborough survey respondents who said they or other members of their household subscribe to wireless/cellular phone service. The data for this report is drawn from Scarborough USA+ 2003 Release 1. The 2003 data on switching carriers is from Release 1 that represents six months of measurements. The other 2003 data represents 12 months. For more information visit www.scarborough.com.

Many have checked out self-checkout lanes

ACNielsen U.S., Schaumburg, Ill., reports that 61 percent of U.S. households have used self-checkout lanes, with 32 percent of those agreeing that "they are great." Many more shoppers who have tried the do-it-yourself checkout lanes (52 percent) said "they are okay," and 16 percent called them "frustrating." The research comes from an ACNielsen Homescan consumer panel survey of 61,500 nationally representative U.S. households. Usage of self-checkout lanes is greatest among larger, higher income, younger, and more educated households.

"Self-checkout is still a relatively new phenomenon, so it's good news for retailers that so many households have tried the new lanes. However, retailers who want to grow consumer acceptance, satisfaction and continued use of the do-it-yourself checkout lanes need to offer shoppers more help in getting comfortable with the process," says Todd Hale, senior vice president, ACNielsen Consumer Insights.

As for the future, 70 percent of those who have tried self-checkout lanes plan to use them again. Just 25 percent of those who have never tried the lanes plan to do so in the future.

"For many shoppers, self-checkout is intimidating," says Phil Lempert, NBC *Today* show food trends editor and a consultant to ACNielsen. "Retailers must be proactive in demonstrating the units and pointing out the time savings for shoppers. Unfortunately, if one does experience a problem — not having a price ring up correctly, for example, or having to wait for a customer service person to correct a malfunction — odds are they will never return to the self-checkout lane again. Consumers have

continued on page 72



consumers spend an average of \$60 a month on their plans. Fourteen percent of consumers nationally plan to buy a cell phone for themselves or another member of their household in the next 12 months.

"Cell phone ownership is becoming ubiquitous; local markets that lagged in cell phone penetration

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names of note

Howe Burch has been named senior vice president global communications and sports marketing for *Fila*, New York. Marketing research will be among his new responsibilities.

Walker Information, Indianapolis, has promoted **Mark Ratekin** to



Ratekin

Thomas

finance and administration group vice president and **David Thomas** to vice president of statistical science.

Janet Hackman has rejoined *Qfact Marketing Research*, Cincinnati, as project director. In addition, the firm has named **Rob Hanson** director of marketing and business development.

Marketing Technology Solutions Inc. (MTS), a New York marketing information company, has named **Jeff Clinton** head of client service for the MTS syndicated division.

Millward Brown Group has named **Brian Jacobs** to head its newly created Media Research Unit. He will be based in London. Millward Brown has named **Edward Laginess** to the newly created position of global director, human resources, based in Naperville, Ill. **Blázs Feitel** has joined the firm's Hungary office as client service director. At SMG/KRC Millward Brown in Poland, **Jan Kunkowski** has been promoted to director of

the department of realization of computer-assisted projects.

In conjunction with the acquisition of New York research firm *Barry Leeds and Associates, Inc.* by Calabasas, Calif.-based Informa Research Services, **Paul Lubin** has been named managing director of Barry Leeds and Associates, Inc., and will also serve as senior vice president at Informa Research Services, Inc. **Michael Adler** becomes the CEO of Barry Leeds and Associates, Inc.

Fort Washington, Pa.-based *TVG Marketing Research & Consulting* has named **Irene Forsen** executive



Forsen

Moak

director, **David Moak** executive director, and **Gary S. Silverman** vice president. The firm has also named **Jim Hoch** West Coast business development associate. He will be based in Los Angeles.



Silverman

Turner

NFO WorldGroup has named **Dean Heller** marketing manager for NFO USA's Northeast Region. He

will be responsible for developing and executing research projects for clients serviced from the company's Toledo, Ohio, and Greenwich, Conn., offices. Separately, **Louis Turner** has been named vice president and general manager of the company's Minneapolis marketing office.

Lewis Oberlander has been named vice president for domestic marketing research at *Warner Bros. Pictures*.

Arbitron Inc., New York, has named **Michael Sharp** northeast regional manager for Arbitron Advertiser/Agency Services.

Ken Tan has been named president of *Perseus-Asia*, the new Singapore office of Perseus Development Corporation, a Braintree, Mass. research software firm.

Charles Pearson has been named vice president and general manager, West Coast operations, for *Greenfield Online*, Wilton, Conn. He will be based in San Francisco.

Frank J. Quirk has been promoted to president of *Opinion Research Corporation*, Princeton, N.J. In addition to his new responsibilities, Quirk will remain CEO of the ORC Macro subsidiary.

Ted Kendall has been named director of market intelligence services at *Glow Technologies*, Greenwood Village, Colo.

Adam Smith has joined U.K. market research firm *ORC International* as account manager.

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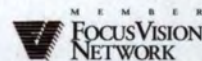
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Analyze media coverage with MediaMind

New York-based StrategyOne, the research division of Edelman, has launched MediaMind, a system for tracking, measuring and analyzing media coverage for individual projects, across a corporation, or against competitors. MediaMind combines analysis and evaluation by StrategyOne with a customized version of Biz360's media measurement application, Market360. The result is the ability to measure results, identify competitive vulnerabilities and opportunities, and refine strategy to achieve program objectives. For more information visit www.strategyone.net.

Test multiple solutions with Evolutionary Choice Modeling

Leon Tyler Marketing Research, St. Louis Park, Minn., is now offering Evolutionary Choice Modeling, which lets users test sets of solutions rather than individual concepts. Like conventional concept testing, this approach begins with a set of target audience needs and desired benefits that represent a new product or service opportunity. But rather than matching an individual technology application with the set of needs and desired benefits to form an individual concept, a set of technologies and ranges of execution variables are identified that could satisfy the target need and provide the desired benefits. The methodology generates a model that predicts the market share potentials for all possible combinations of technologies, execution variables and benefits. For more information call Leon Tyler at 952-836-0071.

New trend reports from Scarborough

New York-based Scarborough Research has announced a new ser-

vice that enables Scarborough users to subscribe to customized consumer market trend reports that are delivered monthly. Named Scarborough Consumer Tracker, this new service permits marketers to monitor market penetration changes, competitive challenges and consumer trends on a local, regional or national level using Scarborough data. The new reports may include information regarding consumer purchasing trends, market penetration changes, competitive fluctuations, product penetration rates, shopped vs. bought ratios, and marketing program effectiveness.

Scarborough Consumer Tracker reports are available as monthly and quarterly deliverables. The specific parameters of the report are customized to accommodate the marketing challenges of the client. This new tracking service has been created as a complement to Scarborough's local and national syndicated databases which are released to clients twice a year. For more information visit www.scarborough.com.

Web-based tools measure message effectiveness

Blackfriars Communications, Inc., Maynard, Mass., has announced a new suite of tools for marketers to assess the effectiveness of their business communications and solve messaging problems. These Web-based tools apply a uniform methodology that analyzes how well messages will resonate with four targeted audiences: customers, media, analysts and salespeople. Through a series of pointed questions, Blackfriars' assessment tools are designed to help marketers develop presentations, Web sites, advertising and collateral with simple, clear and consistent messages. Customers who have entered into a consulting or direct enterprise relationship with Blackfriars have the opportunity to license the assessment tools for a 12-month period. For

more information visit www.blackfriarsinc.com.

Data mining add-in works with Excel

Resampling Stats, Inc., an Arlington, Va., software firm, has released XLMiner, a data mining add-in for Excel developed by Cytel Software Corp. and distributed by Resampling Stats, Inc. XLMiner is a fully integrated add-in to Microsoft Excel. Topics and methods available in this tool include classification (classification trees, discriminant analysis, logistic regression, neural networks, naïve Bayes, k-nearest neighbors), prediction (multiple linear regression with subset selection, k-nearest neighbors, regression trees), affinity analysis (association rules), data reduction and exploration (principal components, k-means clustering, hierarchical clustering), and data preparation (partitioning into training, validation and test data sets, stratified sampling for rare outcomes, missing data imputation, binning, transformation of categorical variables into dummies or category scores). XLMiner also extends Excel's graphics with matrix scatter plots, dendrograms, box plots and lift charts. Because XLMiner is Excel-based, it is designed to have a short learning curve for those familiar with Excel. It can also integrate with other Excel-based analysis the user may already be doing. XLMiner uses Excel primarily as an interface and platform — XLMiner's data mining modules were developed by Cytel Software Corp. These modules do not depend on Excel's statistical calculations. While Excel limits the user to 60,000 rows, XLMiner allows the user to sample from a larger database, do the analysis on a statistically-valid sample, and, for supervised learning, score the results back out to the database. A limited version down-

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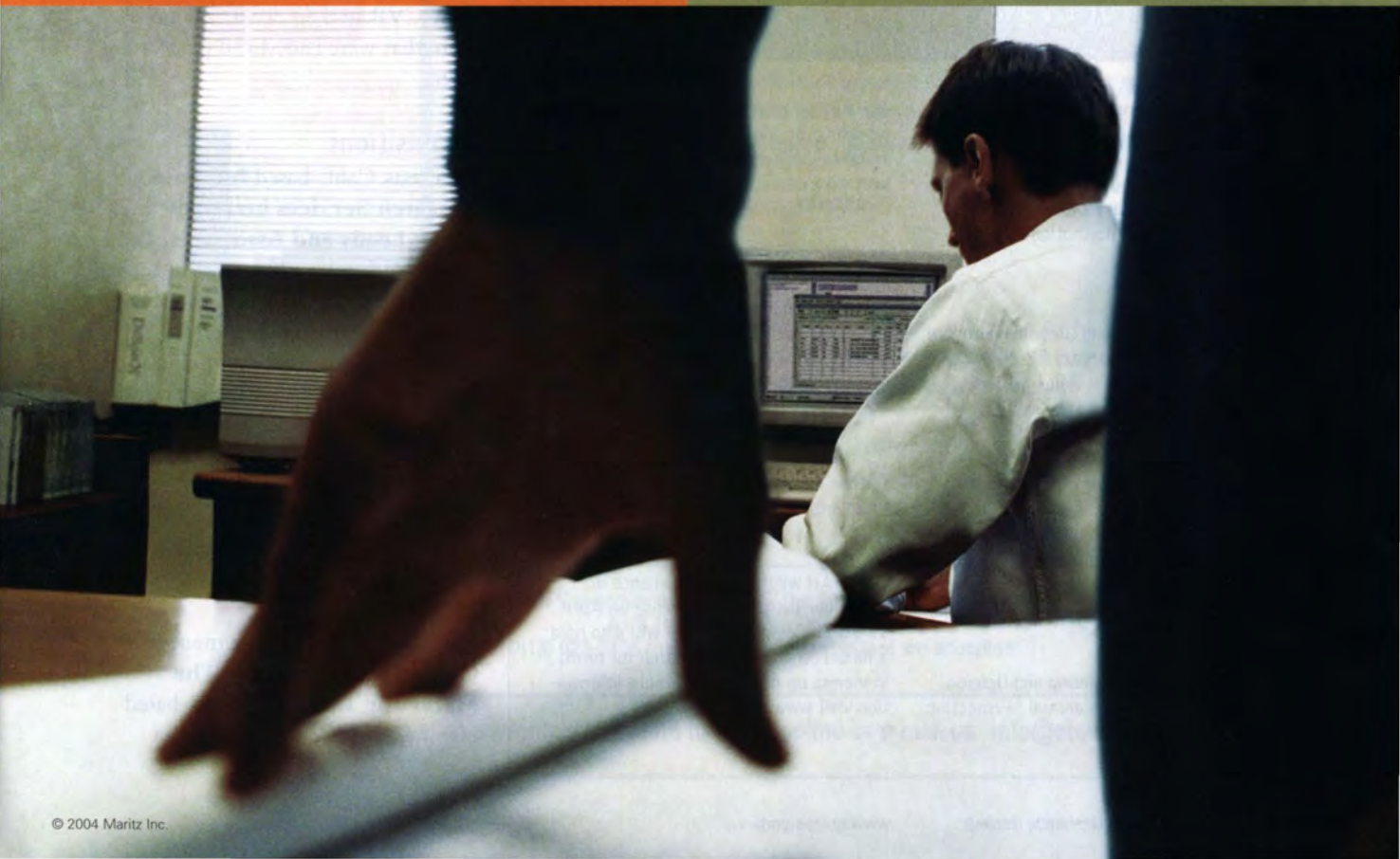
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Some consider research a snapshot.
Others, a report card.

(We contend it's a map.)



News notes

C&R Research Services, Chicago, has brought all of its qualitative offerings under the single brand name InVision. InVision is an addition to C&R's branded quantitative services including KidzEyes, TeensEyes, LatinoEyes and Sage Advice.

The Mexico office of **Millward Brown** has received the ISO 9001:2000 quality certificate for all its operations.

Netherlands-based **VNU** has announced a new organizational structure for its largest business group, VNU Marketing Information. The new structure includes the appointment of a global CEO for ACNielsen (see Names of Note) and the creation of a new unit, VNU Advisory Services, that is charged with developing advanced business solutions for clients.

Catalina Marketing Corporation is looking to sell some of its business units, including its custom research division, Catalina Marketing Research Solutions. The custom research division previously was known as Alliance Research. Catalina Marketing bought Alliance Research in 1999. Specifically, Catalina said it will realign and restructure its domestic and international businesses to focus primarily on point-of-sale applications within the consumer packaged goods, retail and pharmaceutical industries.

In early December, **Gingko Acquisition Corp.** announced that, based upon a preliminary tally by LaSalle Bank N.A., the depository for its tender offer, and the tender of shares pursuant to notices of guaranteed delivery, approximately 27,879,979 shares of common stock of Information Resources, Inc. (IRI) had been tendered into Gingko's ten-

der offer as of December 1, 2003 at 12:00 midnight, New York City time. This figure represents approximately 88.56 percent of the outstanding shares of IRI common stock. Gingko accepted all of the shares that were validly tendered in the subsequent offering period, and was to promptly pay the offer consideration for those shares of one CVR and \$3.30 in cash per share, the same consideration paid throughout the offering period.

A tender of shares in this amount would enable Gingko to exercise its top-up option under its merger agreement with IRI to acquire the number of additional IRI common shares that is necessary for Gingko to own more than 90 percent of IRI's outstanding common shares. As previously reported, Gingko's acquisition of at least 90 percent of IRI's outstanding common shares will allow Gingko to engage in a short-form merger with IRI under Delaware law without requiring a stockholder vote. On closing of the merger, all remaining IRI stockholders will receive the same CVR and \$3.30 in cash per share that were issued and paid in the offer.

Acquisitions

Calabasas, Calif.-based **Informa Research Services** has acquired **Barry Leeds and Associates, Inc.**, a New York research firm. Paul Lubin will be the managing director of Barry Leeds and Associates, Inc. He will manage the fulfillment end of the mystery shop and compliance testing as the two companies' operations are integrated and will further become a senior vice president at Informa Research Services, Inc. Michael Adler becomes the CEO of Barry Leeds and Associates, Inc.

Chicago-based employment firm **CPRi, Inc.** has acquired **The Marketing Link**, a Chicago-based employment firm specializing in

Calendar of Events Feb/Apr

The European Society for Opinion and Marketing Research (ESOMAR) will hold Technovate 2, its worldwide market research technology and innovation conference, on **February 1-3** in Barcelona, Spain. For more information visit www.esomar.org.

ESOMAR will hold its Global Healthcare 4 conference on **February 22-24** in Paris. For more information visit www.esomar.org.

ESOMAR will hold its automotive marketing conference on **March 1-3** in Lausanne, Switzerland in conjunction with the Geneva International Motor Show. For more information visit www.esomar.org.

The Council for Marketing and Opinion Research will hold its annual "Protecting

Our Assets" respondent cooperation workshop on **March 2-3** at the Flamingo Hotel in Las Vegas. For more information visit www.cmor.org.

The Market Research Society will hold its annual conference, Research 2004, themed "Welcome to The Dream Economy," at The Barbican in London on **March 11-12**. For more information visit www.mrs.org.uk.

ESOMAR will hold its Asia Pacific conference on **March 28-30** in Shanghai. For more information visit www.esomar.org.

ESOMAR will hold its Excellence in Consumer Insight 2 conference on **April 18-20** in Vienna. ESOMAR will also hold a forum on managing research for profit in Vienna on April 21. For more information visit www.esomar.org.

placement of marketing research associates. The Marketing Link's operations will move from Lincoln Park to CPRi's offices in the John Hancock Building, making the Chicago headquarters the second largest division in the company.

Chicago-based **SPSS Inc.** has acquired **DataDistilleries**, a Netherlands-based developer of analytical applications.

Alliances/strategic partnerships

Sports Research Partnership (SRP), a joint venture between **SGMA International** and **Sports Marketing Surveys (SMS)**, has been formed to provide market research services to the sporting goods industry. William Lawliss has joined SRP as director of business development. He was founder of Sports Research Inc., a market research company that was purchased by SMS in 1998. The new company will initially offer research services in the team sports, fitness

equipment and athletic footwear industry segments. In addition, the new firm will offer custom research services by using the consumer panel derived from its sports participation survey and online research using a panel of active sports participants for ad hoc and continued research, based on software developed by SMS for its Sporting Insights panel.

Reston, Va.-based **Wirthlin Worldwide** has formed a strategic alliance with **Tedesco Analytics Inc.**, a marketing sciences consultancy, to develop products and services designed to measure communications and marketing return on investment and improve marketers' ability to look at their businesses.

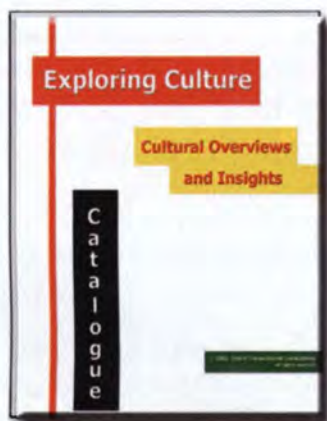
New York-based **Arbitron Inc.** and **TNS Media Intelligence/CMR** have signed a marketing agreement to provide TNSMI/CMR's spot television advertising tracking data to Arbitron's regional and local advertising agency customers. Arbitron's

TAPSCAN Software Suite now includes Market Analysis, a new service that will enable agencies to process TNSMI/CMR's spot TV ad tracking data. Arbitron is the only company authorized to license TNSMI/CMR local TV intelligence to regional and local advertising agency clients.

Association/organization news

Britain's Market Research Society (MRS) has awarded MRS Fellowships and Honorary Fellowships to individuals in recognition of their ongoing contribution to market research. The MRS Honorary Fellowships are awarded to those working outside market research but who have given good service or support to it. The first award was made to Professor Michael Thomas, who has contributed to the theory and practice of marketing. As president of the MRS since 1999, Thomas has been influential in forming many of the

continued on page 78



Exploring Culture Cultural Overviews and Insights

This book provides a very important first step in acquiring the knowledge necessary for success when doing business across cultures. Our goal is to present important background information on some of the major ethnic groups in the United States. Each chapter includes:

- * A brief summary for quick reference
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- * Cultural insights
- * Business do's and don'ts
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- * Information on religion, holidays and language
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Audithost

Mystery shopping coordination software pulls it all together

You will look in vain to the major research software providers for features in their standard data collection packages to support mystery shopping. It has taken a niche player, PAI, perhaps better known for its research reporting tools, widely used throughout the automotive industry, to rise to the challenge with its Audithost — a solution so comprehensive that its integrated modules span all the different levels of the research food chain.

Here's how it works. At the corporate HQ, the mystery shopping program manager uses Audithost to schedule work with regional or local mystery shopping agencies, monitoring the workload as each shop is completed. Mystery shopping agencies log into their

Audithost accounts on the Internet and schedule upcoming work with interviewers. Out in the field, mystery shoppers take a laptop or tablet PC and a digital camera with them. The PC details their schedule of calls and allows them to record each shop online immediately after the site visit. Finally, corporate managers, decision-makers and even local managers at the store receive customized views of relevant and up-to-date results through a password-controlled Web portal.

Easing the burden on the research program manager

The system provides a particularly powerful workflow scheme that takes away almost all of the routine work involved in administering a

Editor's note: Tim Macer is CEO of meaning, U.K.-based independent specialists and advisers in the use of technology for survey research. He can be reached at tim.macer.meaning.uk.com. For more information visit www.meaning.uk.com.

mystery shopping program. At one level, it is a supplier relationship management tool that handles contacts and interactions between mystery shop managers and the mystery shopping companies used.

As it happens, most of Audithost's users are corporate people using the system to manage their relationships with specialist mystery shopping companies working on a regional basis or in a local area, as is common in the United States. However, the system could easily be used by a research agency to administer its in-house mystery shopping fieldwork force, and manage relationships with more than one client organization.

The administrator can enter details of all of the locations to be shopped. Once this has been done, only changes need to be entered. In

Audithost by Productive Access Inc. (www.paiwhq.com)

Pros

- End-to-end support
- Manages all the routine scheduling
- Seamless Web-based functionality
- Highly customizable
- Real-time reporting of results through built-in Web portal

Cons

- Big price tag
- Vendors must agree to use the same solution
- Not suitable for palm PDAs
- No built-in support for real-time mobile data communications with fieldworkers

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the administrator's area is a straightforward tool to design or alter the questionnaire. These questionnaires are typically a combination of binary check box (was this criterion met?) questions and comment fields (what was the problem?), and these are designed and presented to the interviewer as a scrolling form.

Providing a mystery shopping marketplace

With the questionnaire defined and the shop location details set up, you can invite the different shop companies you have contacts for to bid for the work. In fact, you can get them to bid against each other, and accept the most competitive bid. In this way, the tool can create a kind of mystery shopping marketplace, not only ensuring that prices are competitive, but also that standards are maintained and even improved. This is because all of the information on the mystery shopping activities from the agents in the field flows back into the system, and the program manager is able to compare the relative performance of the companies.

Audithost provides the kind of management information that is virtually impossible to get without an automated system such as this. It also means this system can be used to great effect auditing the auditors and making the entire process more accountable.

Audithost will only work properly if all of the mystery shopping agencies use the extranet administrator's portal to log in, collect and

allocate their work. However, it is reasonably intuitive and because it works over the Internet, there is no software to install locally, and no greater requirement than a reasonably fast Internet connection and a recent Web browser. Here, the fieldwork coordinators can register all of the mystery shopping agents and allocate work to them. Once that happens, the interviewers will be able to collect their assignments and the questionnaire and start shopping.

Seeing is believing

Agents need to be equipped with a laptop or tablet PC, running Windows. The software is not designed to run on PDAs. However, most agents tend to go into the premises unencumbered with a laptop, and retreat to their cars to complete the survey form. Not all the evidence needs to be verbatim: it also provides space for a whole gallery of digital photographs on each mystery shop report, which the shoppers can use to attach some revealing images to their written report. For this, all that is required is an inexpensive digital camera. After that it is a simple process to upload the pictures and add them to the report.

It is not unusual today for offline mystery shopping programs to involve some photographs. Pictures can be valuable in verifying that the shop did take place at the time stated, and also that any items referred to (such as litter strewn outside the

premises, or employees not following dress code) were not the figments of a vindictive auditor's imagination.

Doing this online adds a few more advantages. It means the photos cannot get lost or mislaid, and by attaching the images right away, you can be certain that the pictures are of the right location, and are clear and in focus. Furthermore, the images follow the report right onto the desktops of the managers of each location or any decision makers, via the results portal.

Reports on tap

On a daily basis, mystery shoppers can connect to the Internet, using a broadband or dial-up connection at home, and a simple upload/download process exchanges completed audits for new assignments. The results are immediately posted to the results viewing area, which also updates the administrator's statistics and completion reports.

Administrator-level access allows you to view the whole lot, and to grant password-controlled access to individuals or groups of other users. In principle, shop owners are able to view their shop reports, and further up the tree, regional managers and head-office managers can get a broader view. Cleverly, these permission structures self-perpetuate, so maintaining them never becomes over-burdensome.

As results arrive, Audithost examines each report. Business rules set by the administrator can automati-

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Make the right decision

cally create so-called “violation letters” if key objectives have not been met. These can be sent by e-mail or printed for dispatch by regular mail, either to the store, or more tactfully, to the local area manager. A template allows administrators to design these letters to suit individual programs, and the letter can contain specific information about the issue and the steps required to resolve it, all driven from the Audithost database. More positively, congratulatory letters can also be generated automatically, if consistent improvement is noted or high scores achieved.

The contact management aspects of Audithost will even track any challenges from those who consider a judgement too harsh, and allow you to record the outcome. It can ensure that those who regularly make the most noise do not always get off the hook.

Adding accountability

Audithost is a vast system with a hefty price tag: around \$100,000 annually. Its customers therefore tend to be the large national or multinational corporations. Houston-based oil company ConocoPhillips has been using Audithost for one year now to manage its mystery shopping program across its retail network. This covers between 50,000 and 150,000 visits a year. For Harvey Townley, mystery shopping program coordinator, it has eliminated having to juggle endless spreadsheets and has allowed him to move from a department of four employees to managing the entire program single-handedly.

Townley currently works with four different mystery shopping vendors, and in the past, it was impossible to verify that every contracted shopping visit had taken place. He calculates that the savings achieved, by being able to control this area of cost alone, have cost-justified the system. “It also lets us track the accuracy of the auditors and see who is lagging behind schedule,” he says. “It gives me one-click functionality, so I can see where all the audits are, and tell

how many are still missing.”

Commenting on the experience using the application, he reports: “Overall, the application is very well made. It is well-designed and easy to navigate. It is pretty much seamless from the auditors’ point of view.”

Townley welcomes the improved communications it gives with vendors, managers and even the mystery shoppers in the field. “We never

had direct communication with the auditors before,” he says. “Now, we’ve eliminated the snags of having multiple communications going out, and the miscommunications that can arise.”

At a time when mystery shop results are increasingly under scrutiny, Townley feels he has found a way to ensure integrity. “For us, Audithost is that policeman — it keeps everyone honest.” | Q

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The prescription for effective physician interviews

With health care as the largest sector of the U.S. economy, executives throughout the industry are keenly interested in the thoughts and behaviors of physicians. Qualitative research can be an effective way to gather valuable physician insights. But it is important to recognize this segment can also bring with it challenges. Conducting research with physicians often requires not only research skill, but also content knowledge. Based on our experience interviewing physicians and moderating physician focus group sessions, my colleagues and I have developed a number of strategies to help ensure successful outcomes.

Get in line

Competition for this group of professionals by pharmaceutical and medical device companies, hospitals and managed care organizations, to name a few, can make recruiting a challenge.

Consider the following when determining how to go about recruiting and what incentives to offer physicians.

- Compensate for their time. Most physicians we talk to admit that they

don't participate in research without receiving some form of compensation. They may make exceptions if the research is academic or charitable in nature.

- What to pay? The range of what is considered acceptable varies greatly and depends on the specialty of physician needed. Also take into consideration whether the interview is by phone or in person or is an Internet survey that can be done at any time. If the interview is done in person, what is the time investment for the research, including travel time? Carefully consider the honorarium you are offering and whether or not it is enough to attract the right kind of participant to your study. You'll know fairly quickly if you are in the ballpark. We've paid up to \$1,000 for an involved focus group of specialists. Telephone interviews generally range from \$150 to \$300. Be sure to recruit early — doctors' schedules book far in advance.

- Get creative. In our research with doctors, we frequently offer a choice of how they would like to be compensated — either paid directly to them or to their favorite charity. Physicians

Editor's note: Sheryl Bronkesh is president of The HSM Group, a Scottsdale, Ariz., research firm. She can be reached at 800-776-8078 or bronkesh@hsmgroup.com.

appreciate having this option.

The interview

Physicians are turned off when it is obvious that the researcher they are dealing with has little knowledge of the subject matter, yet is charged with asking clinical questions or explaining medical details. One physician told me that he often feels talked down to by an interviewer who has a very superficial knowledge of the topic. Giving participants a perception that the person they are talking with understands the subject matter will result in more complete answers and more valuable insights so critical to qualitative research. How can you accomplish this?

- Do your homework. While it is not necessary to know all the intricacies of a disease or a drug's mechanism of action, it is imperative to know the basics of the condition or procedure,

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treatment options and impacts. Make sure that your interviewer or moderator has learned the material necessary to discuss the topic intelligently.

A recent experience conducting an in-depth telephone interview with a subspecialist reinforces this point. After a long and complicated series of questions and probes, I asked the doctor about a response he had just given that seemed to contradict something he had said earlier about the properties of a specific drug. He expressed amazement that I understood the subject matter well enough to have caught the misstatement. When we finished, he thanked me for the “stimulating” hour-long exchange and commented that this wasn’t like most interviews in which he often rushes through the answers because he knows the interviewer doesn’t have a clue about what he is saying.

- Hire researchers comfortable interacting with medical professionals. An interviewer or moderator must not only be knowledgeable on the subject, but comfortable interacting

with medical professionals and not easily intimidated. However, you also want someone skilled at interviewing, rather than a person with a medical background (such as a moonlighting doctor or nurse) with no research experience.

- Make the process interactive. Telephone interviews, one-on-one interviews and focus groups are all very effective qualitative research methods because of the opportunity for two-way or group interaction. These methods provide for both in-depth and lively discussions. Doctors tell us that these settings are most likely to produce the richest information because interactive research allows for instantaneous feedback, and many feel that writing answers on an online survey takes too much time (especially if the doctor is not adept at typing).

- Probe. The goal of any research is to uncover. Don’t be intimidated by something that you don’t know. If a point is raised that is unfamiliar, follow up with something like, “That is a point I hadn’t heard before; please tell

me more.” Or, “That is a side effect I’m not familiar with; what are its manifestations?”

- Maintain control. Whether it is a one-on-one interview or focus group forum, it is not uncommon for physician participants to get off-task. Some perceive this as their opportunity to get on a soapbox; others may unknowingly wander off-subject and pontificate. A proficient interviewer or moderator must be skilled at reeling in participants, when necessary.

The bottom line

Qualitative studies are not an inexpensive undertaking. Effective discussion guides take time to develop; more time is needed to select and educate experienced interviewers or moderators; recruiting the right participants is a time-intensive job.

After all of your creative thinking, planning, studying and implementation, you are now on your way to helping clients make those strategic decisions requiring insights from physicians. | Q

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Don't eliminate — migrate!

You have a dilemma. One of your largest and most important research projects is facing potential budget cuts. In the middle of a tough economy, you will not have enough money to do the sizable telephone awareness and ad tracking study that you have successfully conducted for the past two years. What to do? You don't want to cancel the study and lose the benefits of the research, but a shorter, less

involved telephone study or a smaller sample size will not give you enough information to justify the expense of the research. What you really need is the same study you've been doing all along.

An unsolvable problem? As recently as a

few years ago, yes, but in today's research marketplace, there are solutions for problems like these. As we'll demonstrate in the following case study, online research tools and methodologies can be used to successfully replace costly telephone studies if carefully designed and properly managed.

Moving a telephone survey to the Web

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Searching for solutions

The following case study is based on a large annual research program for a Fortune 500 telecommunications company (which will be referred to as the telecom company). The study in question was a 12-minute telephone interview with a complex quota structure based on geography, daily completion targets and technology use. In its original format, 30,000 surveys were conducted each day of the year with an RDD telephone sample. A comparable mail study would be as costly as telephone, with postage costs and lower response rates canceling out any benefit gained by eliminating human fieldwork hours. The only feasible option from a cost perspective is the Web.

Of course, there are trade-offs to converting to an online data collection methodology, and these will need to be addressed and understood up front before any decision is made. The primary advantages for the pur-

poses of this kind of study are largely related to cost implications, but certainly not exclusively. Some of these advantages are:

- With an online study, there are no costs for telephone charges, interviewer time, supervisory or quality control time within a typical phone center environment. Online data collection also dramatically reduces the level of professional project management support that is typically spent interacting with a phone center. In terms of the investment of project management time, the online version would require about half the current level of professional effort compared to the telephone equivalent.

- In the online world, there are no time-zone constraints or limitations. Interviews roll in at all hours of the day or night, which accelerates fieldwork and allows respondents to complete the survey at a time that's convenient for them, instead of during their dinner hour or favorite televi-

sion show.

- There are options available to you in an online format that are simply not feasible with a telephone study, such as the use of images for awareness measurement (logos, screen shots of advertisements, etc.). Even streaming video can be incorporated, provided the respondent has the appropriate software — like Real Player or Macromedia's Flash player — to view video images.

- The Web affords an ideal structure for reporting on project progress, with the capability to make quota reporting and topline data available online in real time without the need for faxes or e-mails back and forth.

Some of the disadvantages are:

- End users of the research may have concerns about moving to a still relatively new platform for data collection. They may fear that the results will be vastly different from a comparable telephone study, or that the technology is simply too new to be



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reliable.

- Certain demographic distributions can be different in an online study, resulting in concerns about skew in certain subgroups. Typically, online data collection results in a younger, more affluent and less ethnically-diverse sample than the U.S. population on the whole.

- For a study of this magnitude, a great deal of sample is required, and it will need to mirror the demographic makeup of the U.S. population as closely as possible. There is no true equivalent to a random digit-dialing sample online.

- The most significant trade-off to consider is the projectability of the survey results to the broader U.S. population. The online method most often utilizes as its sample frame an online panel of respondents. Almost invariably, online panel samples comprise individuals who have explicitly opted-in to participate in research studies; RDD frames for the

most part reflect true EPSEM (equal probability of selection method) sampling rules, enabling survey results to be reliably projected to the population universe being measured. In most cases, however, careful sampling of the online frame — attempting to replicate the broader universe as closely as possible — will yield comparable results to the online method. This is true so long as the subject of the research is not totally contingent upon Internet access within households.

Making it work

In the fourth quarter of 2002, this is the dilemma we were facing. How could we design this study for the online environment, and equally important, make sure everyone was comfortable with the decision to migrate this project? It was decided that we would conduct a 30-day parallel test, running the project concurrently on the Web and on the

telephone, with a period of analysis at the back end to determine the feasibility of continuing with this research in 2003 with the appropriate data collection method, if at all.

The questionnaire was programmed in the Web environment, precisely replicating the complex quota structure and hierarchical logic of the telephone study. Modifications were made to accommodate the differences in question layouts in the new format and references to interaction between the respondent and an interviewer.

The most significant revision that had to be made to the questionnaire was the structure of the many unaided awareness questions (“What company do you think of first when considering...”) included in the survey. This is a relatively simple matter on the telephone, with a prelist viewable by the interviewer, but not to the respondent. On the Web, responses to this crucial question are



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collected via input to a text box in a Web browser. With the many possible permutations of the spelling of something as simple as a company name, the capturing and subsequent use of the specific responses within the same survey can quickly become complicated, particularly if the skip logic later in the survey requires restoration of these “open-ended” responses. This was managed by using a combination of text fields and text restores to affix total unaided and aided awareness into the database for future reference by the script.

As described before, the sample frame was an online panel of United States consumers, selected proportionally by geography and U.S. Census demographic data, and then weighted after data collection. (Identical back-end weighting was applied to the telephone control group as well, and in both frames, and is used to mitigate the effects of

non-response bias. This is a different application to front-end weighting used in sampling.) E-mail invitations and reminders were staggered throughout the 30-day fieldwork window to correspond with the daily dialing quotas for the telephone study, ensuring that the distribution of the completes was spread as evenly as possible throughout fieldwork.

Data collection began for the parallel test the first week of December 2002, and ended the first week of January 2003, allowing for a sample size of about 3,000 for each method. We began looking at the data after the first week of fieldwork to identify differences between the methods for key data points.

The results

Our first investigations focused on the demographic makeup of the households that participated in the study. Our principal concern was

that the online data would return vastly different breakdowns from the telephone data, but in fact, this was not the case. Due to careful sampling at the front end, we were able to avoid significant differences in most of these breakdowns.

Respondent age was broken out into the following categories: 18-19, 20-24, 25-29, 30-34, 35-39, 40-44, 45-49, 50-54, 55-59, 60-64, 65-69, and 70+. Among these groups, there were only two where the difference between the unweighted Web and phone data exceeded 3 percentage points. Those groups were 45-49, and 70+.

The mean number of people residing in the household on the telephone was 2.65, and the mean for Web was 2.46, a very slight difference.

For the household income breakdowns, the only significant difference was among households reporting an annual income of under

\$15,000, with the Web data reflecting a percentage 3.74 percent lower than the telephone data. Not a surprising difference, with Internet penetration continuing to skew towards higher income households.

Reaching minorities continues to be a difficulty for online research, which was evidenced by the race and ethnic origin distributions in the data from the Web component of the test. All of our ethnic groups had differences of greater than 3 percent between the Web and the telephone data, with the frequency of minorities completing the interview significantly lower online. This will continue to crop up in online research until the distribution of minorities with Internet access becomes comparable with their presence in the U.S. population. Until then, these issues must be handled with weighting. For the purposes of this study, we weighted the Internet data to the telephone data to provide the most analogous means of comparison.

Gender breakdowns were not hugely different between the two methods, although the difference for both genders was significant. In both methods, a much higher distribution of women completed the interview than men.

The findings from the demographic analysis provided us with what we needed to weight the data appropriately, but the most interesting results of our comparisons came from the ad awareness section of the questionnaire, which is one of the focal points of the research. This section was designed to gauge recall and sponsor identification of ads for the telecom company and its largest competitors. Each respondent was asked about two advertisements, one for the telecom company and one for a competitor. These ads were randomly selected from a list of ads that were running during the fieldwork window. In the telephone version, text descriptions of the ads would be read to the respondent, who was then asked to indicate if

they recalled seeing or hearing these ads. Then those who did recall the ads were asked to identify (unaided) the companies associated with those ads. In the online version, the text descriptions of the ads were presented on the screen for the respondent for the same exercise.

What we found when we compared the data for this section between the two methods was a systematic increase in the online version, both in awareness of the ads and in correct identification of the sponsor of the ads. This was the case for the telecom company as well as for each of the three competitors who were tracked. For the telecom company, for example, only 28 percent of respondents remembered the ad they were asked about on the telephone, compared with almost 40 percent online. Of those who remembered the ad, 34 percent correctly identified the telecom company on the telephone, compared with 75 percent on the Web! With the exception of one competitor whose historical performance has been poor in this section, these increases were similarly significant.

We believe the primary factor driving this increase for the online version is the ability of the respondent to see the text on the screen and respond to it in their own time, rather than having to make a split-second decision while on the phone with an interviewer. We may be pulling in some of the people who would report no awareness on the phone because they didn't have the opportunity to really think about it. In addition, there is the real possibility that our subject matter impacted awareness here. Because the companies we asked about were purveyors of technology-related services, an Internet audience may inherently be more aware of such products and services when compared to the general population. Both factors will require further investigation to quantify the impact on our data.

A happy ending

After the data comparisons were completed, we found that what dif-

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ferences exist between the two methods could be accounted for and worked around. In many cases, there were no significant differences at all. Where necessary and possible, revisions were made to the project structure to minimize these differences (adjustments to quotas) and maximize the new options available (incorporation of screen shots from television ads for ad recall and brand awareness). The project was renewed for 2003, utilizing the new method. The telecom company will be able to conduct research that will meet its business needs, even in the midst of steep budget cuts. Bottom line: don't let the combination of budget cuts and the increasing cost of telephone data collection spell the end for your research. Your solution may just await you online.

Recommendations for transitioning a telephone study to the Web

- Identify your universe first. If you need to interview a specific

minority group that is largely unrepresented on the Internet, a totally online study may not be for you. Investigate the possibility of a multimode study, with online AND telephone components. However, most studies with the general population or with a client's customer base can be easily transitioned to an online environment.

- Pay close attention to your sampling. Duplicating your frame online is one of the most important aspects of this transition. If you have a general population study, make sure your sampling is targeted to U.S. Census data up front.
- Run a parallel test for at least 30 days with your original method to determine which data points, if any, yield significant differences in the new method. Use this information to make appropriate adjustments to your questionnaire.
- Keep your questionnaire as short as possible. Online surveys do

move faster than telephone, due to the absence of the interviewer/respondent interaction, but even online respondents are subject to survey fatigue, and you may experience high dropout rates after a certain point, and introduce the risk of bias when the respondent grows tired of the survey. If you can, keep your script at 20 minutes or less.

- Take your time. Because of the ability to field surveys quickly, the inclination to rush the fieldwork process is significant. However, that which is true in the telephone world about respondent availability to complete surveys still holds true for the Web. If you field your study in a three-day window without a weekend, you will systematically eliminate those people who only check their e-mail at that time. Try to schedule your fieldwork to cover at least part of a week and one full weekend to maximize your representation. | Q

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Does speed kill the data?

A key benefit of using an online consumer panel is the ability to shorten field length. Obtaining consumer input faster can give marketers a competitive advantage, especially for quick-hit issues that require timely decisions.

Although sampling is the foundation of any research project, researchers have struggled to find a sound source from which to draw an online research sample. Online consumer panels have become one of the most popular methods of sampling for an Internet survey. Mail and telephone consumer panels have been used for years, so many researchers see Internet-based panels as simply a logical extension of an established sampling technique.

Researchers can collect hundreds of surveys in one evening using an online consumer panel. To compare, it would take at least three weeks to collect the same amount of surveys using a mail methodology. If cost is not an issue, telephone interviewing can sometimes be used to complete fieldwork in one night. Unfortunately, experience tells us that completing a telephone study in one night does not always produce the most representative or reliable sample (i.e., different types of people tend to be available at different times on different nights).

Some researchers have wondered if the rapid pace at which online surveys are completed may introduce similar problems associated with overnight telephone studies. Past research suggests that between 70 percent and 80 percent of responses to online survey invitations are received

during the first day of fielding. If the quota for a given project or quota cell is reached in that first night, then 20 percent to 30 percent of your sample elements did not have an equal opportunity to take part in the study.

In this article, we explore the use of replicate sampling in an online application. Replicate sampling is a procedure often used by government agencies, academic institutions and research organizations

that require strict adherence to probability sampling. Instead of using one large sample frame, the sample frame is divided into small mini-samples. Each of these mini-samples has identical characteristics of the full sample frame. Researchers thoroughly work one replicate at a time, not releasing a new replicate until the previous one is exhausted. This technique ensures full use of the sample frame and prevents a certain type of consumer from being disproportionately represented in the final set of data.

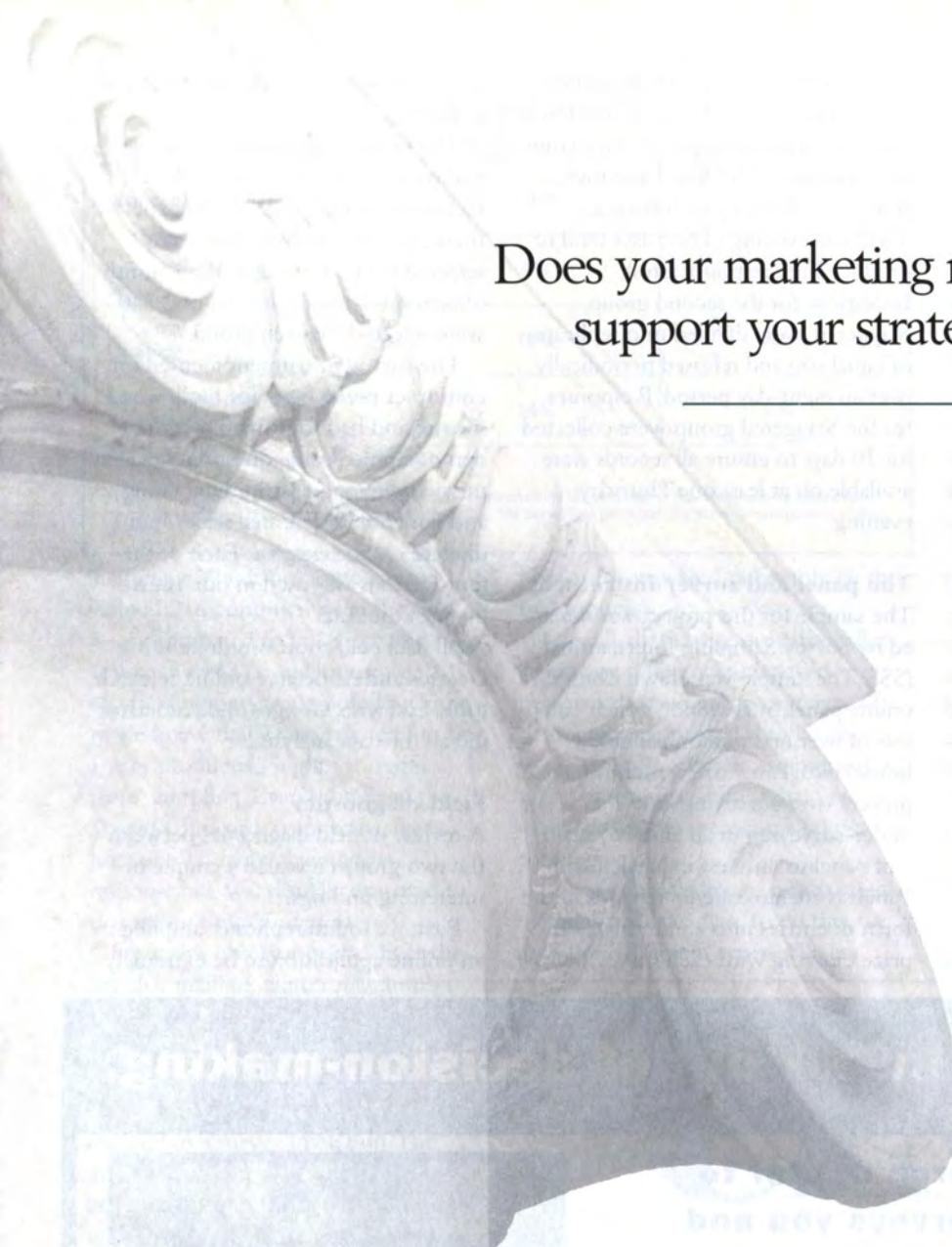
Pure replicate sampling requires a lengthy, systematic process that,



By Paul Curran and
Nicole Cicogna

Validating overnight sampling with an online research panel

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unfortunately, isn't always possible or realistic in the realm of commercial market research. Market researchers have, however, adapted the procedure in such a way that is now commonly used in offline methodologies such as telephone and door-to-door interviewing. It is unclear if applying a similar technique to Internet research would prove beneficial, particularly when the research involves the use of an online research panel.

This is the main focus of our research. While faster fieldwork is a key benefit of doing online research, we need to understand if completing the fieldwork quickly impacts the quality of the data we collect. By expediting the fieldwork, do we bias our sample with those who are more eager to participate in surveys or by those who may check their e-mail more frequently? Are those more eager to participate in surveys reading diligently and answering in a coherent way, or are they rushing through just to get the incentive?

To answer these questions, we analyzed the results of a typical online sur-

vey taken by members of an online research panel. Panelists were randomly placed into two groups — One-Time and Staggered. All One-Time invitations were sent to panelists on a Thursday evening (Thursdays tend to produce high response rates). Invitations for the second group, Staggered, were divided into replicates of equal size and released periodically over an eight-day period. Responses for the Staggered group were collected for 10 days to ensure all records were available on at least one Thursday evening.

The panel and survey instrument

The sample for this project was donated by Survey Sampling International (SSI). The sample was drawn from SSI's online panel, SurveySpot, which consists of over one million panelist households. Panel size is monitored to prevent over-surveying as well as under-surveying in an effort to maintain panelists' interest in participating. Panelists are also offered rewards in the form of entries into a monthly cash prize drawing with each survey invita-

tion, increasing their likelihood of participation.

The sample was national in scope and balanced to the most recent U.S. Census demographics. In this experiment, the same sample sizes were selected for both groups, using an nth selection technique. A total of 2,340 were selected for each group.

The survey instrument focused on consumer preferences for Hollywood movies and had four main sections: demographic profile questions, general movie preferences, attitudinal rating and semantic differential scales, and a discrete choice exercise. Each of the four sections was used in our assessment of the data.

All data collection was done using Gongos and Associates' online research tools. Likewise, Gongos and Associates did all the data analysis.

Field diagnostics

A review of field diagnostics between the two groups revealed a couple of interesting findings.

First, we found replicate sampling in an online application to be extremely

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Table 1: Field Diagnostic Statistics

	Staggered Approach	One-Time Approach
Number of Invitations Sent	2,340	2,340
Percent Responding*	9%	17%
Percent of Responders Who Qualify for Study	78%	81%
Percent of Qualified Respondents Who Abandon Survey	14%	8%

*Unlike most research projects, no attempt was made to contact/remind non-responders. This, along with the somewhat trivial nature of the survey, likely drove down response rates. The SurveySpot panel typically delivers response rates of 30 percent.

inefficient. The One-Time sample yielded 216 completions in the first 24 hours compared to the Staggered approach's 143 completions over a 10-day fielding period. As noted previously, we knew that Thursdays tend to be a very productive night for online panel sampling. Even though all the Staggered records were active for at least one Thursday evening, its response rate was dismal compared to that of the One-Time group.

From this observation, we hypothesize that mailbox clutter may impact response rates as much or more than the day of the week invitations are sent. The more full one's e-mailbox becomes, the less likely one is to respond to a survey invitation. The time and day survey invitations are sent becomes an important consideration when executing a successful online research project.

The other finding worth noting was the rate at which qualified respondents abandoned the survey. Those responding to the One-Time invitations were much more likely to stick with the survey than were those in the Staggered group. Response and incidence rates are shown in Table 1.

Experiment results

Our first challenge was to measure the effect of the sampling procedure on the ultimate survey results. We wanted to establish whether or not the two groups were composed of the same type of respondents and if the two groups answered questions in the same way. To determine this, we looked at the demographic profile of the respondents and the extent to which ques-

tions were answered differently by the two groups.

Overall, there were no statistically significant differences observed between the two groups in terms of demographic profile. Likewise, there were very few differences observed in survey responses (about what you would expect to see using a 90 percent confidence level).

Our second challenge was to assess the quality of the data. To do this, we used three different types of assess-

ments:

Respondent attentiveness (appropriateness of interview length): Companies experienced in conducting online research know the importance of monitoring the time respondents spend going through the survey and even the time respondents spend on each page of the survey. Regardless of the sample source, there is always a small proportion of respondents who complete the survey in an incredibly short period of time. At Gongos and Associates, this proportion is referred to as the "race-through rate."

Consistency in response choices: When doing a discrete choice or choice-based conjoint survey, researchers will often include "hold-out tasks." Hold-out tasks appear just like any other choice task except they are held out of the analysis when building the choice model (hence the name). While the main purpose of the hold-out tasks is to test the predictive ability of the model, they can also be used to test the reliability of the data being collected. This is accomplished by placing two identical hold-out tasks



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Table 2: Summary of Selected Responses

	Staggered Approach	One-Time Approach (all)	One-Time Approach (first 24 hours)	One-Time Approach (first 143)
	n=143	n=143	n=300	n=216
Frequent Movie Patron (10+ movies per year)	15%	15%	16%	15%
Took a Child To The Last Movie They Saw	32%	34%	32%	29%
Average Age of Respondent	42 years	40 years	40 years	40 years
Percent Married	55%	60%	61%	58%
Enjoy Dramatic Movies	39%	38%	38%	39%
Enjoy Musicals	57%	54%	53%	56%
Agree There Is Too Much Violence In Movies	21%	23%	24%	23%

at different parts of the choice experiment. The percent that respond differently to identical choice tasks is referred to as the “test-retest failure rate.”

Data reliability: Our survey instrument includes a “Hollywood animosity scale.” This is an additive scale based on five attitudinal statements related to common complaints of Hollywood movies. As part of our evaluation of data quality, we used a test statistic called Cronbach’s alpha to measure the reliability of the scale. A higher alpha score indicates a more reliable scale. We would expect to see no differences in the alpha statistic between the two groups of respondents.

With respect to data quality, the results were somewhat mixed:

- There were no statistically significant differences between the two groups in

terms of average length of interview. What’s more, both groups had similar race-through rates (well under 10 percent).

- The test-retest failure rate was comparable for both groups. There were, however, some directional indications that suggest those in the Staggered group answered in a more consistent fashion.

- The alpha measure for the Staggered group was slightly higher than that of the One-Time group, suggesting respondents in the Staggered group answered in a more cogent manner.

- As one might expect, data quality measures increased considerably after removing those who were thought to have raced through the survey.

Conclusions

Overall, researchers would draw the

same general conclusions from either dataset. Although our research shows that the Staggered approach may produce slightly higher-quality data, the negatives outweigh the positives in that the Staggered approach generates an extremely poor response rate. This experiment, along with other research conducted by Gongos and Associates and Survey Sampling International, allows us to offer the following recommendations to online researchers:

- In most situations, it is best to release all the survey invitations at one time. Care needs to be taken, however, when a project involves filling multiple quota cells at an even pace (for example, when recruiting for an in-home product test or product clinic).

- Encourage clients to field projects over a four- to five-day period. When an overnight sample is absolutely necessary, work with your research sample provider to determine the most strategic day/time to release the survey invitations.

- Use quota sampling to ensure that your final sample matches the demographic profile of your population. Set quota cells up in a matrix format, as opposed to standalone quotas.

- Dynamically monitor the length of time respondents move through the survey, terminating those who appear to be racing through without reading the questions. When working with a company that hosts a survey for you, make sure it can accommodate this request and insist it include real-time monitoring of race-through rates.

Sound practices

The early days of online research were marked with the fervor of gung-ho advocates and the cautious uncertainty of old-school skeptics. Over the years, top research companies and sample providers have worked hard to cut through the hype and hyperbole and carve out a set of sound online research practices. Many of these best practices have been refined through careful analysis of case studies and experiments. We hope this article contributes to that body of research and that it may encourage additional research focused on online research sampling. | Q

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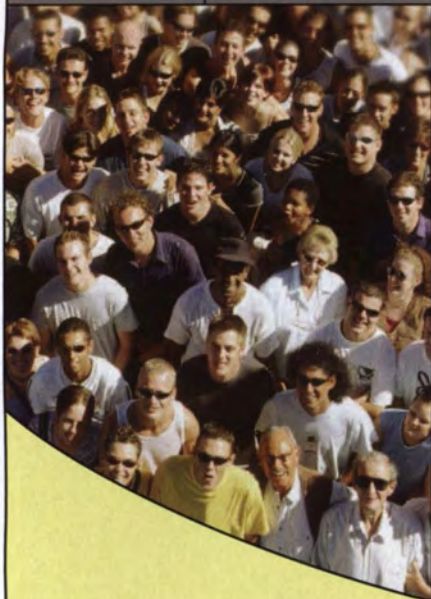
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When consumers whisper their values

When people interact online, all they have is words. They cannot see facial expressions or hear shifts in tone or emphasis. They don't spend much time typing, and they don't use many words but they make those words work. They project their opinions: *We should do this... You wouldn't do that.* They hedge their bets: *Well, maybe I could... Sometimes they might.* They specify conditions: *If this happens, then...*

Browse a transcript from an online focus group or an online chat, and you will very likely be struck by the leanness of the communication: short one- and two-syllable words, lack of complete sentences, missing subjects and verbs. This terseness leads people to think that online dialogue conveys far less information than face-to-face conversations, and it does. But people's word usage in the online environment goes a long way to make up for the loss of cues from body language and intonation.

The online universe does not just look or feel different, it is different. People change their language use, or modify their ways of cooperating with each other, and sometimes even change their names. But people's inner motivations don't really change. And they keep the same style they use when they talk. That style can be captured.

Even in the online universe, as in face-to-face interviews or focus groups, style can be scaled to measure group solidarity or cohesion; style can also be scaled to measure consumer perceptions of a brand or service.

People have a constellation of preferred ways for expressing themselves, each dependent upon the context of the conversation, and they take those preferences online.

An analysis of consumers' online styles can show the social engagement that is occurring within groups or between an interviewer and interviewee. Style, even online style, can be scaled to determine the strength of a stance or position that an individual is taking toward a topic.

Our research finds the meaning that's wrapped up in people's style.

Ask people's opinion about something. Here's what they typically use their own style to do:

- tell you what they don't like;
- muffle their response, when they want to avoid hurting your feelings;
- disclose personal experience when they're seriously interested;



By Peyton Mason

Analyzing the words people use in online dialogs

Editor's note: Peyton Mason is president of Linguistic Insights, Inc., a Charlotte, N.C., research firm. He can be reached at 704-814-0886 or at ktmason@msn.com.

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• qualify their reaction when they're feeling cautious.

It's the way they do it — their signature style — that tells you what they mean. People's style is located in the way they choose and arrange their words. Our approach looks at those words from multiple perspectives, combining quantitative and qualitative approaches to consumer communication to uncover their points of view, including the ones they thought were hidden.

Multidimensional approach

To get under the surface, we first use a set of multidimensional techniques that are typically used to analyze a collection of spoken, written or online texts. Sometimes the analyst uses these techniques to look for potential areas of deception. Other times, an analyst uses them to look for evidence of authorship. We use these techniques to look for ways people signal their attitudes.

We draw on statistical analyses to determine underlying associations across a speaker's — or a group's — language features. The approach is based on the assumption that "statistical patterns reflect underlying shared communicative functions" (Conrad and Biber 2001:7).

The approach is multidimensional because style is considered a bundle of language features that co-occur in text because they work together to mark some common underlying language function.

The qualitative aspect of this analysis is the interpretation of how the factors signal the impact of a particular bundle of language features.

What we quantify

We employ a database of conversations. Each new transcript from an online focus group is compared to our database of online styles. We quantify and analyze consumer language, in order to determine:

- how comfortable the participants are in the communication situation;
- how tentative they are with their personal response;
- when and how they quantify

their opinions;

— when they're ready to commit to something;

— when they're edging away;

— how they recommend action; and how, all the way through, they send soft signals of their own values.

Our database of language styles contains 750,000 words and includes both face-to-face and online conversations (chats), interviews and focus groups. It's important to have selections from numerous topical areas. For instance, in the online universe of chat groups, topics serve as "places" where language styles can differ in the same way the different sections of a high school — classroom, auditorium, lunchroom, gym — constrain the way teens choose their words, their tone of voice, even the choice of who speaks to whom. To ensure a broad base of language usage, the full database contains groups and chats on: travel, family, friendship, money, music, religion, friendship, health, hobbies, books, sports and politics. The subset of online focus groups covers finance, travel, fashion and online retail, representing different regions, ages and genders.

From words to dimensions

We've all heard the old saying: "It's not what they say; it's how they say it." To see how they say it, we coded all the texts in the database. Each text in our full database was coded for 90 parts of speech, which were then analyzed for frequency. In this part of the analysis, we look at how people use their words to take a stand on a topic.

Our series of factor analyses identified the 33 strongest patterns of word choice. Next, we scaled the factors to establish benchmarks that locate when members of a focus group change their position, signal their commitment or move into evaluation. People's stance shifts as the words scroll down the screen or arrive on the bulletin board. Meaning is not found in words alone. It's also in how words are put together. We measure both the what and the how. Here is why: In online focus groups, responses are short — five to seven words is a typical utterance. Two lines (or about

18 to 20 words) are a lot to type. Responses are time-constrained and pressurized; utterances are unplanned, compressed and full of typos. And the responses are truncated: The participants do not repeat nouns and verbs used by the online moderator.

Our benchmarks signal what people have to say, when they say it, and how people collaborate to construct meaning when they are online, regardless of whether they are chatting, sending e-mail or participating in focus groups. The “when” benchmarks are the locations within a focus group discussion in which the participants are taking a stand. The “how” tells us what the stand is that they are taking.

The participant in online discourse must be able to realign in seconds to changes in topic, addressee-addressor relations, size of audience in terms of number of participants and the entrances or exits of conversationalists, and in the tone of general or specific interactions. What the moderator or analyst needs is some way to go

beyond the obvious, identifying subtle shifts and masked or buried “hot areas” of a transcript that typically stay hidden until the fifth or sixth pass through the material.

In online focus groups, people don’t hand you their meaning with the verbs they choose. Half the time, they leave out the verbs. Instead, meaning is carried by: adjectives, adverbs and adverbially-used prepositions — not all at once, and not to the same degree. But they are the carriers of meaning, and participants arrange other types of words around them — sort of like trimming a tree — to signal the direction of the online discussion and the strength of their feelings or opinions. When scaled, the interactions among these carriers can identify the successive stages of the stance a person is taking toward the topic under discussion.

For example, in the online universe, personalization is handled by first-person pronouns, but the second-person pronouns are typically used as a way to project belief or action, one

step away from “I.” Combinations of verbs of perception or cognition with modal auxiliary verbs — we called them “helping verbs” in school — can signal conditional interest.

Stance Analysis Monitor

The Stance Analysis Monitor methodology lets us identify consumers’ feelings toward a topic or brand or other stimulus, and their indirectly-expressed opinions. Focus group participants do not always want to say directly that they value or more often, what they do not like about a product or brand. Sometimes, they’re not sure of what they think until the words spill out of their mouth or onto the keyboard.

Stance is measured along four dimensions that measure the degree:

- Strength — this is the intensity with which people whisper, speak or shout their position.
- Conditionality — this is the extent to which people will qualify or list conditions constraining an action or a response.



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• Hedging or waffling — here's where people back off, mitigate or soften their position.

• Action-orientation — here's where people announce their intended action or project that action onto other people.

No single grammatical or semantic feature tells the story. It's the interaction between content and context that determines which language features are used. Stance Analysis Monitor is multidimensional, and each dimension signals informational load and social involvement (Conrad and Biber, 2001).

The impact of language combinations

Language choice can signal social involvement. Ever read a note — or an online chat — and feel like you can spot who knows whom, and how well? Some grammatical forms suggest a speaker is focused on becoming involved with the listener: When speakers delete the “that” after a statement of belief, opinion or perception, they are often suggesting or initiating a social relationship, increasing the potential for social cohesion, and inviting a similar response. “I believe we're ready to get that” has a different impact from “I believe that we are ready to get that.” And “You'll think it's great!” is far more comfortable with its exclamation point than “You'll think that

it's great!” Using “that,” particularly online, gives a deliberate, weighty, formal air to the conversation. If your online focus group starts using “that” in its sentences, watch out: participants may be feeling uneasy, or may be backing away from commitment.

What about “you”? “You” doesn't always mean “you, Dear Moderator,” or “you, Dear Reader.” It is often used as a sort of generic, where it suggests informal, colloquial, familiar conversation among people who are acting as if they ought to know each other. The “you” in these examples from our collection is not the “you” of direct address to the reader or hearer: here, the “you” means “I, we, or everybody”

You definitely need comfort in shoes.

You can get them like at Goody's for only \$5.00.

Dressing up makes you feel good.

The trick is to decide when you means I, we, somebody, or anybody. The answer is usually keyed to context. By context, we mean who's talking to whom, about what.

“You” is often used to suggest a hypothetical situation. Its use lets the speaker/writer achieve a little distance, moving away from full ownership of a situation or idea. That lets the speaker/writer make a comment on a situation without taking full responsibility for it.

Communications researcher H-Y

Tao thinks that the first person to use “you” in this way in a conversation is actually taking on the status of the privileged speaker. We think it's a gentle form of one-upmanship. Look at how the writer assumes authority by using “you” in this sentence:

“If you're going to write ads aimed at your audience, you'd better use their current language.”

What does it all mean?

A multidimensional analysis of online language spotlights the word-use equivalent to the visceral responses, body language and involvement that are not observable online. It bridges the gap of being able to “view” participants as you would for an in-person group. You do not have to hire a brass band to take a stand: most people do it with a wink or a single word. Finding the online equivalent is where an approach like Stance Analysis Monitor is useful. It helps to get under the surface to detect what is important. It:

- Replaces the loss of body language and intonation of in-person groups.
- Spotlights participants': opinions and rationales; personal engagement with the topic and each other; waffling; and potential for action.

After the focus group or the interview is over, the analyst has three tasks. Everything rests on how he or she takes an inventory of the changing positions, changing degrees of commitment, changing attitudes throughout the group or interview. The first task is to figure out the big story of the ebbs and flows in a discussion. The second is to look objectively at what people meant, when alliances or topics shifted, when the meanings blurred, and how engaged the participants were. The third is being able to compare transcripts, and that's hard. | Q

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It's the user satisfaction, stupid

When the Internet first burst on the scene it was a magical, technical and complicated treasure chest guarded by Young Turks speaking a different language and creating a whole new set of rules. We all had visions of glorious overnight success in which money would rain down from heaven — or through the wires as the case may be. As we are all painfully aware, that didn't happen.

The good news: There is no doubt that the Internet is here to stay and will play an increasingly large role in our lives as an information resource and as a convenient shopping channel. As the Internet matures, it is clearly being integrated into the mainstream of business...and being required to follow rules of fiscal discipline.

The bad news: In spite of the growth and increased sophistication, there is still a huge amount of anticipated ROI being left on the table by site-owners.

The problem

Depending on the study you read, anywhere from 50-75 percent of online transactions are abandoned, with site visitors either going to a competitive Web site for their transaction or foregoing it altogether. Why? Because the Web sites they are visiting are riddled with usability hurdles — confusing navigation, incomplete information, and slow page loads, to name a few. A 2001 study by Arthur Andersen showed that more than 83 percent of Internet users are likely to leave a Web site if they feel they have to make too many clicks to find what they're looking for.

This is not to say that companies have not attempted to manage their Internet assets. Many have taken advantage of assorted site log analysis and stress-testing tools. And, many have even done some usability research, though it is usually after a site has been developed.

While these tools are important aides in the management of Web sites, many of these site owners are missing the broader picture: Analysis efforts are most effective when part of a fully integrated research and development program.

Critical to understand is this: From a development and customer satisfaction point-of-view, Web sites are just different "products" in spite of the fact that many people perceive them as being a different medium. As such, a company's Web site needs to follow the same rules of traditional user satisfaction studies — just like that for breakfast cereals, frozen vegetables or laundry detergents.

It's a communication vehicle...it's a product...it's both

"But we don't sell our Web site...it's a different medium for communication of our message to our clients." Very true. But, unlike the other com-



By Sarah Hiner

Editor's note: Sarah Hiner is marketing and operations advisor at RelevantView, an online usability testing company based in Westport, Conn. She can be reached at 203-221-1500 x110.

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munication channels such as radio, TV or print, Web sites are directly controlled by each company and directly impact customers' experience with a company's product(s). You are in control of the format and design of the channel and the way in which your users interact with it. As such, your users must be satisfied with their experience of it — or they won't use it or possibly your products.

Every marketer knows that lifetime value is the key to long-term success.

- For consumer packaged goods, this means that a coupon in the Sunday newspapers can encourage trial of a new product, but product quality is what sells future purchases of the product.

- Magazine publishers know that their real profit occurs when subscribers renew their subscriptions beyond the first year.

- Retailers know that a customer will not return to their store if they did not have a satisfactory experience — finding the product(s) they need with an acceptable level of service.

- Direct marketers are driven by the lifetime value of a customer — not how much they spend during the first purchase, but how much they will continue to spend during their lifetime with a company based on positive customer experiences.

Much like the retailers, the direct marketers and the CPG manufacturers, Web site owners must reframe their perspective on their Web sites to realize that it is a product that must be developed and managed just like any other in order to achieve maximum ROI.

What to do about it

Site owners must return to the basic principles of market research and new product/concept testing. In so doing, they need to incorporate site research into their annual budgets and schedules. Specific research elements to be incorporated include:

1. Identify the objectives for the Web site. What customer need(s) does it/will it satisfy? While this does not involve outside research, it is a vital first step to take for any and all new products, including Web sites. One of

the toughest challenges for site owners is to determine who is going to use the site and for what. This may seem obvious for some sites, but it is an especially large challenge for the many sites that service multiple customer constituencies.

2. Brand equity/consumer needs research. Run qualitative or laboratory studies to gather consumer feedback on early Web site design concepts and the fit between the site concepts and the objectives/corporate brand equity. Does the proposed site meet consumer needs and perceptions?

3. Early-stage concept development. Run qualitative research to gauge broad directional feedback on site objectives and strategies.

4. Quantitative feedback to design concepts. Once concept options have been developed, use quantitative studies to help identify the leading choices in a statistically significant way.

5. Detailed review of live site, both qualitative and quantitative feedback. Once the new site is fully functional and near launch, run a series of qualitative and quantitative studies to gather detailed information about the site's subtleties as well as statistically reliable feedback on the core functionality and the site's look and feel. The research should include measurement of actual site usability and task performance in addition to measurement of the look and feel of the site. Disaster-checking a site before launch is far cheaper than launching a bad site and losing customers and credibility forever.

6. Competitive analysis. How do you stack up against the competition? Perform quantitative research on a regular basis to ensure your place in the market is secure. New online tools allow you to run head-to-head comparisons of designated tasks at yours and your competitors' Web sites.

7. Continuous monitoring. As the Web site continues to change and grow it is important to monitor the changes. Pretest functional enhancements to the site to ensure their effectiveness. Are key tasks able to be accomplished in fewer clicks? Are all of the links still working? Do new design elements continue to support the brand identity?


Like with traditional marketing, Web development questions are best answered via a combination of qualitative and quantitative research. Conduct qualitative at the early stages of product development and use more quantitative methods as the site gets closer to launch and broader, statistically significant feedback is required to confirm multimillion-dollar decisions.

The critical thing to always keep in mind, however, is to be sure to start research as early in the development process as possible. Studies have shown time and again that monies invested at the early stages of site or software development have a huge return on investment in terms of software quality and usability while monies invested later in the process have a much lower ROI due to mistakes in development that must be reworked. Failure to invest money in research can be the most costly, resulting in poor sites, unhappy users and operational inefficiencies.

Where to find the money? If you have money allocated to Web site development and maintenance, then you have money for usability research. Jakob Nielsen, a leading usability expert, recommends that 10 percent of site development budgets be allocated to usability testing. This investment will garner, on average, a 135 percent increase in site usability. Keep in mind, when planning research and site development projects, the most significant increase in usability comes from improvements to form-filling and navigational activities rather than from changes to the site's look and feel.

Throughout the life cycle

In order to successfully manage corporate Web sites, it is increasingly critical to measure performance throughout the site's life cycle — from earliest development stages to mature maintenance mode — beyond simply tracking site traffic and log stats. Site owners must treat their Web sites like their brands, constantly measuring customer perception and satisfaction, benchmarking vs. the competition, and investing in research efforts to ensure that development efforts are effective. | Q



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Painting a truer picture

The Internet revolution taking place in the marketing information business is just hitting its stride. Today, about 10 percent of research is conducted online — but online market share is growing quickly. All indications are that, in the next few years, online will account for about 70 percent of research dollars. As this change occurs, the amount of core and high-stakes research migrating to the Internet will also rise. While there will always be roles for other media — particularly where they suit research needs better than the Internet — online custom research will certainly be the most common future methodology for informing business decisions.

At this pivotal time, as Internet research moves from a new method to a core method, important questions must be investigated:

- How can online research be reliably integrated with business decisions?
- What are the opportunities and the pitfalls in applying online research to decision-making?
- What are the differences between higher- and lower-quality Internet research approaches?

All of these issues must be understood by users as we go forward. Correspondingly, other factors that affect online marketing information quality — such as the environment for recruiting, maintaining and retaining respondents — are also at a tipping point, and changing even faster than the business uses of online research. Clutter, spam and slowing growth

of computer and Internet penetration are all creating dramatic transformations in the online world — and more change is on the horizon. As a result, users of online research must not only be cognizant of how to choose and apply online research today, but also must know how to move through the chaotic future we are facing.

Through an ongoing research-on-research program, our firm is committed to understanding how, in the context of better decision-making, researchers, marketers and social scientists

all must adapt to the evolving consumer and online environments. We must challenge ourselves to use the Internet revolution not just as a change in data collection method, but as an opportunity to maximize research's value for more informed consumer-based marketing decisions. But to make this important leap, we must first gain a thorough understanding of the variety of online research tools and their effects.

Is data from a representative online panel more valid?



By John J. Lewis

Editor's note: John J. Lewis is president and CEO of Knowledge Networks, a Menlo Park, Calif. research firm. He can be reached at 650 289-2050 or at jlewis@knowledgegenetworks.com.



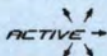
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Quality dictates

Research quality should be defined by its impact on the business decision. Research outcomes are determined by the quality of the sample, the research design, or the analysis and interpretation of results. This assessment deals mostly with sample quality, which varies widely in the online world. Simply put, sample quality dictates the soundness of results. So, while supporting decisions with good research requires more than high sample quality, it is a necessary precondition if one wishes to project findings beyond the specific set of respondents used in a given study. Thus, sample quality represents the most logical place to start assessing online studies and their business impact.

Most online research respondents come from one of two sources:

- Volunteer panels and e-mail lists: Consumers who have volunteered to participate in ongoing research; most are obtained via pop-up ads, e-mail blasts, word of mouth, list purchases.
- Volunteer rivers: Recruited by many of the same techniques as panels and lists, these respondents have volunteered for one-time research only.

Two things are common to both of the above types of sample. First, neither of the populations are defined by the researcher (anyone and everyone can sign up and participate in research conducted in this manner). This poses

security as well as methodological risks. Second, neither of these methods is based on random selection — so respondents, in essence, choose the research(er) rather than the other way around.

An alternative to these methods is the representative approach, as embodied by the Knowledge Networks Panel. The panel is based on a representative sample of the full U.S. population — both Internet and non-Internet households. Sample members are initially recruited by phone; those who do not have Internet access are given it free of charge. The result is an online sample that represents all U.S. households.

In any research, there are three primary types of bias associated with sample source:

- coverage bias: excluding certain groups from the universe of potential respondents;
- self-selection bias: allowing respondents to be “self-chosen” (“volunteerism”), rather than using a pre-designated sample; and
- non-response bias: receiving survey responses from only some of those who were invited to participate.

Depending on the methods employed, these sources of bias can have a dramatic effect on survey results. The job of the researcher is to minimize, as much as possible, these biases. Thus, the “quality” of sample should be judged with reference to these types of

bias. A brief description of each follows.

Coverage bias: Findings from Pew’s highly regarded “Internet and American Life” studies show that 61 percent of the U.S. population goes online from any location to access the Internet or to send and receive e-mail; this level has remained constant for well over a year. This means that, for the foreseeable future, any sample that is derived wholly from the Internet population — as volunteer online samples are — will exclude 40 percent of the population. The fact that there is no universal database of e-mail addresses also means that there is no way to create a probability sample of the 60 percent of consumers who are online. And, since Internet use is skewed to upper-income, white, highly educated people, this segment will be over-represented in online-only samples.

By contrast, 96 percent of the population has a telephone number; thus, a sample recruited from a universe of telephone numbers will exclude only 4 percent of the population.

Self-selection bias: Opt-in samples are, by definition, self-selected; and those who volunteer to participate in research represent a narrow sub-group of the Internet population — possibly more opinionated, and more interested in the topic of the survey or in answering surveys in general. When the researcher, via random sampling or other techniques, chooses samples then self-selection bias is eliminated.

Non-response bias: If a representative research sample has been chosen in advance, the quality of findings will depend on the ability to obtain answers from as many potential respondents as possible. In the world of telephone research, this means maximizing the number of surveys obtained from a pre-selected sample of telephone numbers.

Volunteer Internet surveys do not have a predefined sample; their respondent pools consist of whoever has seen a given pop-up ad or received an e-mailed solicitation. Since this universe is almost never defined in volunteer surveys, it is impossible to prompt participation through follow-up messages.

Using a representative approach minimizes the three sources of bias as

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Table 1: Summary of the Levels of Success in Coverage, Panel Recruitment, Survey Response

	Coverage of U.S. Population	Panel Recruitment Cooperation	Survey Response
KN Panel	96 percent (Non-telephone HH not covered)	39 percent	50 percent-90 percent (7- to 30-day fielding period)
Volunteer Internet	57 percent (Non-Internet HH not covered)	.02 percent	15 percent-35 percent (7- to 30-day fielding period)
RDD Telephone	96 percent	N/A	25-50 percent

Put it in context

The value of research quality cannot be established or understood in the abstract; it must be tied to specific interpretations and business decisions. Are the quality variations from one survey to the next large enough to change actual decisions about products, ads, policies or commodities? Placing quality differences in this context demonstrates their significance — or lack thereof — and gives clients a sense of how best to deploy different types of research.

To shed light on this issue, we used two surveys as opportunities to compare volunteer research to that produced by a representative sample (the Knowledge Networks Panel). In both cases, after the proprietary surveys had been completed by KN, we obtained volunteer sample from prominent vendors and fielded the same instrument among those groups. (For more information on these studies, see Pineau & Slotwiner, "Probability Samples vs. Volunteer Respondents in Internet Research: Defining Potential Effects on Data and Decision-Making in

follows:

- Coverage: Because the sample for the representative panel is based on the telephone universe, only 4 percent of the population is excluded.
- Self-selection: Respondents are selected via random sampling; no self-selection is involved.
- Non-response: In our case, we make aggressive attempts to build a community — to recruit its full sample to the panel and to maintain their participation through incentives, newsletters and other techniques.

Table 1 compares average levels of success for typical volunteer Internet research, RDD telephone studies, and

the Knowledge Networks Panel.

Some researchers have suggested that bias caused by opt-in samples can be essentially eliminated after the fact through weighting and balancing. But such adjustments can only be made according to a standard demographic profile that cannot reproduce the unpredictable ways that a truly representative sample would respond to a given set of survey questions. And our research has shown that, even with sample balancing, results from opt-in surveys can still differ widely from representative research — a fact we illustrate below.



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Chart 1: Past-Month Off-Premises Alcoholic Beverage Consumption Among Men 21-27 Knowledge Networks Panel vs. Volunteer Sample

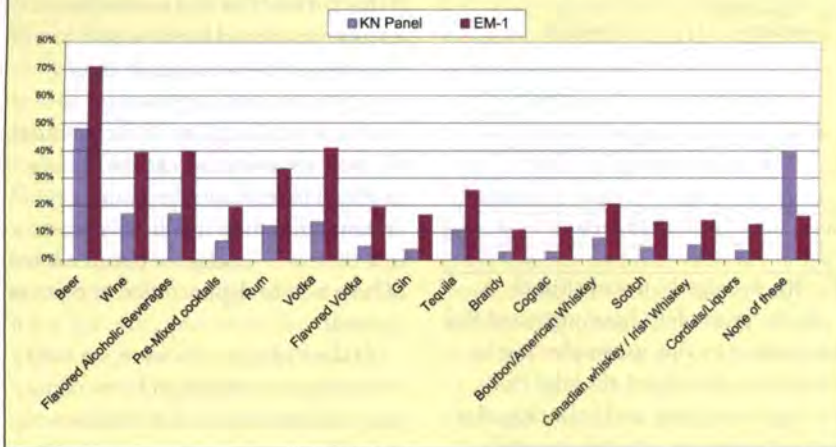
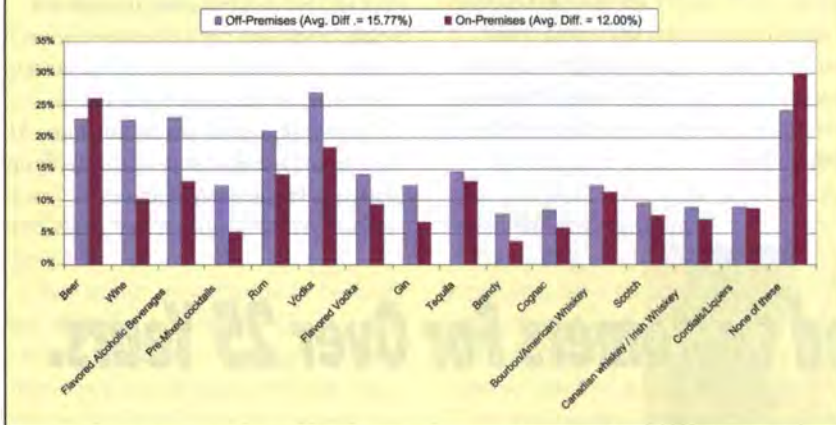


Chart 2: Past-Month Out-of-Home Alcoholic Beverage Consumption Among Men 21-27 Knowledge Networks Panel vs. Volunteer Sample (Absolute Differences)



Marketing Applications.” Knowledge Networks, 2003.)

In one case, a study of alcohol product potential among young men was fielded with two different opt-in samples, yielding three data sources. In the other, research on acceptance and liking of a new line of facial products was conducted among one volunteer group, as well as the KN Panel. In both cases, the volunteer samples produced data that was consistently different — often to extremes — from the representative KN data, and would have led to different marketing decisions. And in both cases, the client affirmed that the representative KN findings were more in line with expected levels and thus would be considered the definitive findings.

In the alcohol research, we first examined the data to see whether or not the different vendors produced

comparable levels of on- and off-premise alcohol consumption among men ages 21 to 27. Second, we evaluated whether the data exhibited the same relative distributions across the vendors. Finally, we investigated the extent to which weighting the volunteer samples changed the results of the first two analyses. In all cases, we found that the data from the volunteer groups differed significantly from the KN data.

Chart 1 summarizes the estimates derived from the first question in our survey: “Which of the beverages listed below have you consumed in your own home or someone else’s home in the past month?” Data are presented for the KN sample and from one of the volunteer list vendors. (We could not use the data from the second source for this chart because that vendor would only provide data for the qualified completes [hard liquor drinkers], and

this table is based on all completes.)

The average difference between the representative and volunteer estimates is about 16 percent. Reproducing this chart for the second question — “Which of the beverages listed below have you consumed outside the home, for example in bars, clubs or restaurants in the past month?” — yields nearly identical results (the mean difference in the estimates was 12 percent). Chart 2 summarizes these differences by category for the measures of on- and off-premises alcohol consumption.

The measures of on- and off-premises consumption, then, show clear disparities across the two groups — differences large enough to influence decision-making. The pattern of higher consumption in the volunteer group holds true for practically every type of alcoholic beverage examined in the study.

If the client were trying to estimate the overall size of the market for flavored alcoholic beverages and intended to invest heavily in product development if the size of the market exceeded 25 percent of males age 21 to 27, the final business decision would have been different depending on whether they relied on KN panel data or volunteer respondents. The result could have been development and launching of a product whose demand was significantly lower than expected.

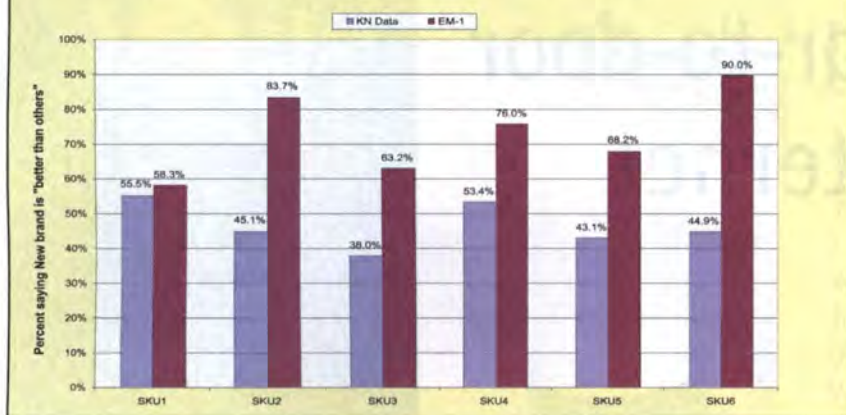
Similar results

We obtained similar results — with equal potential to impact marketing decisions — when comparing volunteer and representative findings for the facial products study. The study was intended to supply answers to important questions such as:

- Who are the early triers of the new product line (in terms of demographics and behaviors)?
- Does the profile of early users match initial marketing efforts for the line, or does the targeting need to be refined?

To answer these questions, it is critical to obtain accurate measures of incidence and reliable data on the demographic profiles of users. If the target group is not, ultimately, representative of all new users, then measures of product performance and benefits may be

Chart 3: Individual SKUs for New Facial Products Brand versus Broader Category Knowledge Networks Panel vs. Volunteers



skewed as well.

The KN Panel data indicate that U.S. marketplace penetration for the line is about 1.2 percent; that is, 1.2 percent of those surveyed said they used the product one or more times per week. This figure is appropriate for an HBA product six months post-launch in a highly fragmented category. The volunteer group, however, yielded substantially different measures of brand usage; the line penetration number was 3.3 percent — nearly two-and-a-half times the representative panel data estimate.

Other differences were clearly evident between the two samples. For example, the profiles of brand users described by the two sources of data show notable deviations. Early brand triers identified via the volunteer study appear to be younger, more educated, wealthier, and have more children than their KN data counterparts; they are also less likely to be African-American or Hispanic. All of these skews match the classic profile of Internet users.

Chart 3 shows the data differences between representative and volunteer samples in terms of those liking the new products “better than others.”

The disparities between the estimates of brand usage could lead the manufacturer to draw dramatically different conclusions about the success of its product. As these data are used to make explicit decisions regarding advertising and marketing efforts, overestimation of the brand’s success could lead to decreased marketing support when, in fact, performance is average for the category. Such a mistaken decision could

have serious consequences for the brand.

The extreme difference in the profiles of early adopters painted by the two data sources could also yield divergent business decisions. Understanding the basic characteristics of early adopters is key to assessing and refining marketing strategy. It affects all decisions related to the purchasing of targeted media for marketing and communications efforts. As a result, misunderstanding this group — as would likely happen with the volunteer data — could lead to an unwarranted change in course, or lack thereof.

Unlimited potential

The Internet offers almost unlimited potential as a marketing and public

policy information source, and is fully suited to core studies if appropriate methods and quality checks are deployed. Studies like those discussed above demonstrate that different online research resources and techniques can yield very different results and change business decisions; knowing the effects of these factors is essential to taking full advantage of all that the Internet has to offer.

We will continue to explore quality issues of all kinds related to research — an initiative that will take on growing significance as the online business and research environment continues to transform. Pop-up blockers, anti-spam technologies, the growing number of companies soliciting respondents via the Web, and government regulation all are poised to transform the Internet experience. Their effects demand monitoring and adjustment among those who wish to fulfill the Web’s potential as a market research medium.

The path to informed business decisions — by researchers and information suppliers alike — requires that the characteristics and business value of quality research become a high-profile issue in the industry. Understanding how to use and unlock the power of data obtained from the Internet is perhaps the most important opportunity — and challenge — in market research today. | Q



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From door-to-door to the Internet

It's 1963. A client calls. His company has a great new detergent it wants to test in your market. Your job is to get the product into the hands of 50 qualified respondents and convince them to do two follow-up surveys about how the new product performed. Sounds like a product placement you might be asked to do today. The difference is that today you could do this using one of several methodologies. Back then the choice was pretty much limited to door-to-door.

Glyna Kilpatrick, field director at the Nashville Research Group in Nashville, remembers those door-to-door days and the procedures researchers had to follow for sampling, security and follow up: Normally women were the interviewers and often traveled in pairs for safety. They would be assigned a neighborhood and were given an exact pattern to follow. They worked to the right, knocking on doors, screening mostly women, who back then had not made the mass migration to the job market. Once they got a placement they would skip over a set number of houses before they knocked again.

Looking back, she says it is still amazing to her how many people invited them into their homes, sometimes two to three times over the course of a study, for no incentive other than the product itself. She also remembers some of the crazy things that she experienced, including having the clipboard jerked out of her hand, or the time she was chased down the street, or when a naked man answered the door!

Twenty years later, in 1983, if those same specs came across your desk, you had choices. Between 1960-1990 telephone interviewing replaced much of face-to-face interviewing in industrial countries. During that time there was also growth of mail panels and mall interviewing. Although there was early resistance to the new methodologies, the timing of their emergence was perfect, as door-to-door

was becoming a thing of the past as people became more security-conscious and women left home to join the workforce. It was now possible to pre-recruit by phone or mail, then mail the product or send respondents to a central location or mall for pick-up. Follow-up surveys could be completed by phone, mail or in-person at the mall.

Nowadays, you receive an e-mail with those same specs. And there's a new kid on the block: online data collection. Initially online was embraced by some as a viable alternative and rejected by others who

Product placement research moves into the 21st century



By Janet Savoie

Editor's note: Janet Savoie is director, client development, at Harris Interactive Service Bureau, Nashville, Tenn. She can be reached at 615-383-2502 or at jsavoie@harrisinteractive.com.

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saw it as a non-proven technique. Acceptance of online research has been going through the same stages that phone did in the '60s. However, with a large percentage of the population now online at home or at work, more and more researchers are finding their comfort level. Initially used for low-complexity customer satisfaction surveys with client lists, the Internet can now handle the most complex designs and deliver a



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- Can clarify unclear responses
- Lower shipping costs

Mall Weaknesses

- More socially acceptable responses
- Interviewer error
- Not always representative of population
- High staff & facility needs
- Additional data entry

Online Product Placement

Internet Strengths

- Minimize interviewer bias/ social acceptability
- Target respondents easily
- Faster recruits/follow up
- Respondent completes when convenient
- Higher response rates
- Recruiting costs lower

Internet Weaknesses

- In-depth probing
- Shipping costs higher
- Not representative of very low income and elderly population
- Small sample sizes (<200) not necessarily cheaper
- Considered convenience sample – NOT random

sample of the general population.

The scope of the projects fielded online has grown to include product placements. Recruits can successfully be found online for placements for everything from granola bars to toilets. (Yes, I said toilets. It has been done.) What online brings to the table is one-stop shopping. Rather than dealing with a number of malls and perhaps a WATS vendor, the online service bureaus can recruit in all markets, and do all the follow-up surveys. In addition to the data collection, they can provide sampling, programming, incentive fulfillment, coding and tabs. They don't usually ship the product, although they provide contact information for those

respondents who have agreed to participate. The partnering of an online vendor and a mall facility is another alternative. The malls actually do the recruit, screening and product placement. Respondents must have an e-mail address as they are sent an e-mail invitation to participate in the recall surveys.

What's the right method?

With all the data collection choices available for product placement, what's a researcher to do? I actually asked several researchers that very question. The consensus seems to be that the "right" method, as always, depends on research objectives, timing and the budget. But since it's

Telephone Product Placement

Telephone Strengths

- Establishes human contact
- Probe and clarify vague answers
- Complete a study relatively quickly
- Moderately representative of the larger population

Telephone Weaknesses

- Completion rates have declined dramatically (DNC)
- Surveys becoming less representative
- More socially acceptable response
- Interviewer bias
- High staff and facility needs

Mail Product Placement

Mail Strengths

- Long response categories
- Privacy
- Sensitive questions
- Low staff and facility needs / cost
- No interviewer bias
- Respondents complete at their convenience

Mail Weaknesses

- Cannot probe open-ended responses
- Respondents can selectively respond to questions
- Additional data entry step
- No face-to-face contact

hard to find a methodology that is always "faster, better and cheaper," usually trade-offs have to be made.

Their opinions on the issues of quality, cost and speed are documented below (two responded via e-mail; the rest were interviewed by phone) and then summarized by method in accompanying charts.

• Recruiting the right audience

Gerry Cain, president, TIP Research, Kansas City, Mo. (via e-mail): "From a methodological standpoint, online product placement may make more sense over mall/CLT if diversity in participant recruitment is an important factor. The publics in a mall are 'conveniently' gathered and generally demographically similar. But there is a large percentage of the population

that avoid mall atmospheres (i.e., skews mostly women), or the available public may skew racially (fewer minorities in suburban malls; fewer non-minorities in urban settings), by income, or some other less visible way.

"A concern about Internet product placement is the lack of availability of a large, accurate e-mail list from which to recruit, and the reality that there is still a large portion of the population that has neither e-mail nor Internet access."

Lynda Manning, vice president of sales, Universal Survey Center, New York: "I don't put products in malls that require all males. For example, men's hair color is not a good fit. Higher-end products also don't work as well in the mall but are great online."

Beth Fischer, president of The TCI Group, Minneapolis: "When sight screening is a factor — looking for plus sizes, for example — the mall is best. However, mall traffic is not always a good read of the market as most attract shoppers within a five-mile radius."

Dianne Littlefield, field director, de Kadt Marketing & Research, Inc., Ridgefield, Conn.: "I prefer the mall because I've always done it that way and I know what to expect. I know who my audience is. I worry

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Moderator introduces first specific product concept.	3	Edit
Respondent reaction to first concept.	3	Edit
Moderator introduces second specific product concept.	3	Edit
Respondent reaction to second concept.	3	Edit
Respondents talk about specific product experiences.	3	Edit

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about the representativeness of an online panel."

• Response rates

Lisa Doyle, vice president, C&R Research Services, Inc., Chicago (via e-mail): "It is our experience that recruitments and placements made via the Internet yield a much higher response rate than more traditional methods. First, a recruit/placement made via an online panel yields a captive, interested audience. Second, the completion of the follow-up survey is done at a time that is most convenient for the respondent. Third, higher response rates mean that our clients can produce less product which, in cases where prototypes are produced by hand, can be a huge 'win' for the client and their budget."

Beth Fischer: "It's easier for the respondent to disengage if it's not in-person. However, people are becoming more used to engaging in a virtual world."

Lynda Manning: "If a respondent has been recruited at a local mall, they

know where to go if they need help. That face-to-face contact makes them more committed."

• Cost

Lisa Doyle: "First and foremost, the issue of cost is probably one of the biggest areas of advantages to an online product placement. We've found that the cost of an IHUT [in-home use test] recruited and placed through more traditional avenues can be cut in half when recruited via the Internet, which is quite appealing to clients who face budgetary constraints and cuts on a daily basis."

Dianne Littlefield: "The cost of product fulfillment has to be factored in. It's one shipment per mall vs. hundreds of individual shipments if it's done online. A disadvantage of the mall is interviewer error. You have to rely on them to give the correct product to the correct respondent. Mis-placed products or products placed with non-qualified respondents is a waste of time and money."

Lynda Manning: "The trade-off

might be that the shipping for online is higher but the recruiting costs are low enough to make it more appealing."

Beth Fischer: "You must always consider your research objectives, but most trade-offs are driven by price."

• Speed of data delivery

Gerry Cain: "For obvious reasons, online makes sense if quick turnaround time is critical."

Lisa Doyle: "The shortened recruitment phase is another prime benefit for recruiting an IHUT via the Internet. Recruitment from an online panel usually takes about a week, with incidence of the group you are looking to target playing a small role."

• Quality of information

Gerry Cain: "An advantage of mall/CLT is the presence of an interviewer, who is able to clarify questions or responses, if necessary. There is also an element of 'instant validation,' which is difficult to achieve online. Survey respondents tend to report greater satisfaction in their involvement in surveys if their participation is active — engaged in mall/central location testing or interacting with computer — rather than passive — listening on the telephone. Increased satisfaction among participants translates into better responses and hence, better marketing intelligence."

Diversity of tools

What I learned from talking to my colleagues is that they are not totally committed to any one methodology. They evaluate each project, weighing the necessary outcome with the advantages and disadvantages each method offers, and make thoughtful, educated decisions. There also seems to be a movement towards mixing methodologies. Researchers today are armed with a diversity of tools in their briefcase and this is what clients want and expect in this 21st century world of choices. I'd love to hear from readers with comments or from those who wish to share their experiences with product placements. | Q



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Conducting Web site usability research

At the beginning of the 21st century, Web site usability research was probably the fastest growing area within the market research industry. Everyone was pouring money into developing sophisticated sites, e-commerce was booming, new site concepts were being developed on a daily basis. Then the market crashed, budgets shrank, and the resources available for developing and testing new sites dried up.

But research moves in cycles. Companies have recently begun to remember the importance of evolving, expanding and refreshing their Web presence. And as Web development dollars have begun to grow again, so have the resources for Web site research.

While it is clear that companies are returning to usability research, the jury is still out on how usability research should be conducted. This article is meant to provide professional researchers and clients with a perspective on conducting usability studies. It does not attempt to define the "best" way. Rather, it is meant to provide a point of view and some suggestions that may help shape the discussion.

At the simplest level, there are two basic approaches to Web site usability testing and each has its own strengths and weaknesses. In this article, we'll focus primarily on qualitative usability interviews.

Qualitative usability interviews

Qualitative Web site usability interviews are traditionally done with one respondent — or site visitor — and one interviewer sitting together at a computer. The interviewer prompts the respondent with a series of open-ended questions as he directs his or her attention to different areas of the site (e.g., home page, nav bars, product layout) and asks the respondent to attempt a variety of tasks (e.g., sign up for an e-mail newsletter).

By watching how respondents navigate the site and by listening to their comments, patterns emerge in how visitors respond to both the site as a whole and to specific elements. As the interviews progress, the moderator is able to drill down deeper and deeper into these areas. Research questions that can best be addressed by this methodology include:

- What is the visitor's overall impression of the site?
- Is the site easy to navigate and does it follow a logical design?
- What are the obstacles to completing important site tasks?

Because the interviews are qualitative, a large number of interviews are not necessary. We typically recommend 10-15 interviews per user segment. Therefore, if you are just testing one segment consider doing about 12 interviews, but if you're testing two segments (e.g., design engineers and line of business managers) try a total of 18-20 interviews.

Clients are often attracted to this idea of conducting usability research in a focus group setting; it increases the efficiency of the process and lowers the per-interview cost. However, it also dramatically reduces the effec-



By Jacob Brown

Editor's note: Jacob Brown is principal of In-Depth Research, Tiburon, Calif. He can be reached at 415-789-1042 or at jacob@in-depthresearch.com.

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tiveness of the research. In order to truly assess the user's experience, the respondent must be free to navigate the site as they might at their own desk, not while trying to keep up with a group. The group setting creates a distance between the visitor and the site and the interaction between group members interferes with the respondent's ability to clearly communicate his experience with the interviewer.

A group setting can be an appropriate choice when exploring design concepts and getting feedback on new ideas. In that case, the group is used in the same way that one might do an advertising concept test or creative exploration. The focus in that case is on the strengths and weaknesses of different design strategies rather than understanding how it feels to navigate through the site.

Quantitative usability surveys

Quantitative Web site evaluations are great when you want to test alternative design elements or choose between different site layouts, or select navigation iconography. But quantitative surveys are generally not very helpful in understanding the visitor's experience.

Use a quantitative approach when you need a statistically reliable answer on which design alternative visitors will prefer. Examples of the types of questions you can answer best with a quantitative approach include:

- Do visitors prefer lots of small product pictures on one page or a few larger pictures on two pages?
- Which icon style most clearly communicates its meaning?
- What percentage of respondents can successfully find a specific item from the product inventory?
- Which navigation strategy results in the fewest dropouts?

Assessing site usability

Web designers often believe that the fewer the clicks the more usable the site. Nothing could be further from the truth. Visitors will report a much more positive experience for a page that uses five clicks that are logically designed and easy to find than for one that only takes two clicks, but requires them to hunt through a page of con-

tent to find the right link.

Try to resist the urge to focus on the number of clicks it takes to find a specific page or how many seconds it takes to complete a task. Instead, investigate the respondent's experience finding the material or completing the task.

- What did you expect when you clicked on that link?
- How did you decide where to click?
- Did the path feel logical, fast, easy to find?

The answers to these questions will be much more useful than just learning that it took three clicks to find the account sign-in page.

Visit other sites

Research participants cannot design a Web page for you. If you ask a respondent "How would you like to see the product page laid out?" they will rarely provide a useful answer. After all, they are Web surfers not Web designers.

At the same time, respondents are excellent at telling you what they like or don't like about a Web page. That's why it is often a good idea to visit other sites during the usability interview. If you're not sure which approach to take when designing the sign-in page, take the respondent to two or three other sites and have them compare the different approaches. That way you can quickly discern some of the advantages and disadvantages that go with any design decision.

The goal is not to rip off someone else's design; you are just giving the respondent something to look at and respond to. This will stimulate the discussion and provide more actionable insights than by asking them to come up with the design on their own.

Similarly, it may be useful to have them visit some of your competitor's sites. This is an opportunity to understand how your site stacks up against your competitors and understand the different imagery that each site communicates.

Negotiating turf wars

Large corporate Web sites often suffer from ongoing turf wars. The site is "owned" by multiple business units,

each of which lays claim to a portion of the site's footprint and navigation structure. As a service department, without budget or authority, the Web group often has a hard time laying down the law and managing the conflicting needs of the business units.

Three signs of this type of internal conflict are: one menu for the corporate site and one for the business units; page layouts that change from section to section; a homepage that is packed with information but has no overall organization.

In these cases the usability research has often been commissioned as a means of forcing the different site owners to cooperate and impose design rules. It is often best to resist the temptation to have the research be the judge of the best site design style or graphics. Instead, focus the research on how the lack of consistency impacts the user's experience. For example, do respondents:

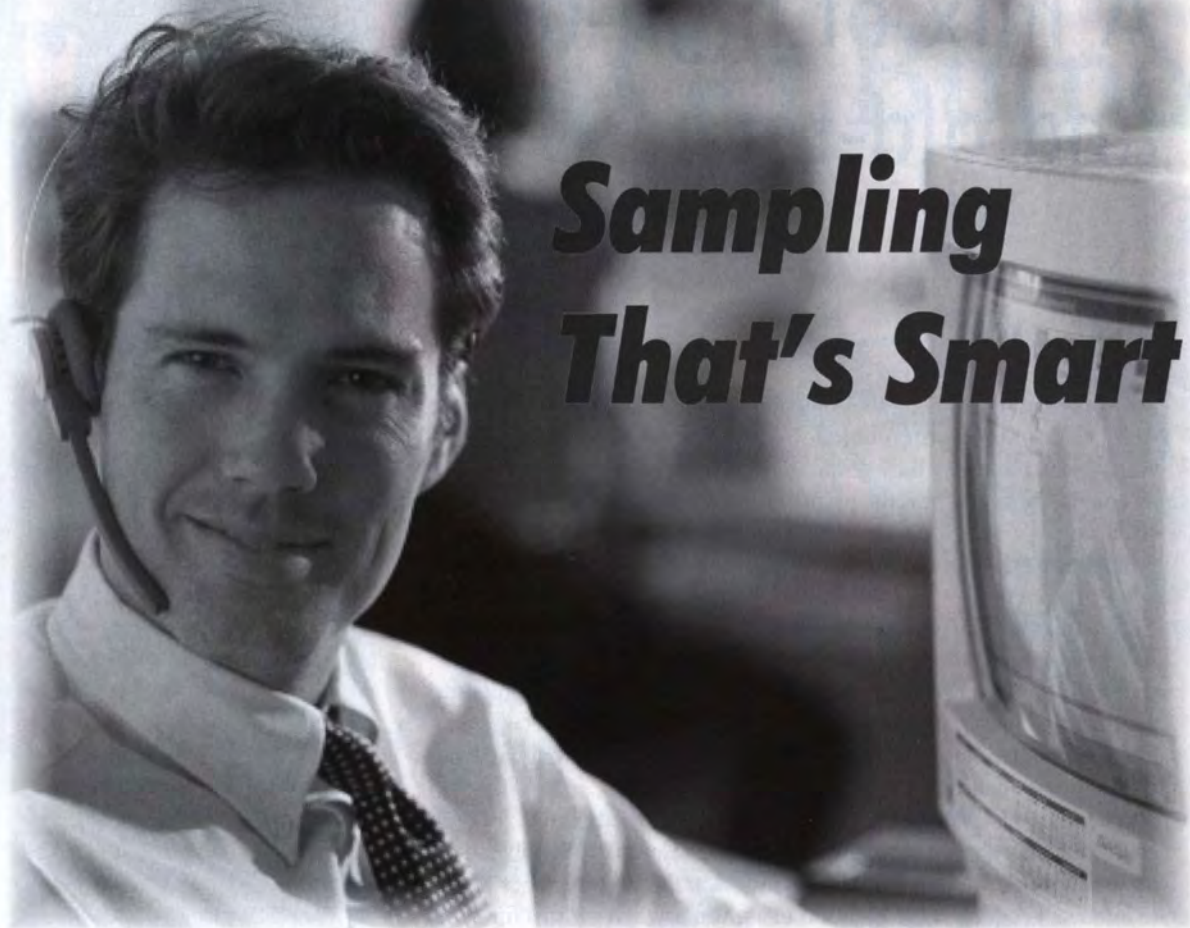
- Know where they are on the site?
- Understand the roles of the multiple navigation menus?
- Realize when they've moved from one division's site to the next?
- Get lost and not know how to retrace their steps?

Testing imagery

It is very easy to become so focused on the mechanics of a site that you forget that your site is also an expression of your brand. In addition to the more functional or task-driven research activities, have the respondent take a step back and respond to questions like:

- What is the first impression you get from the home page?
- What kind of person is this site designed for?
- How does the site fit with your perceptions of the company?
- How does the site make you feel about the company?
- What is the company trying to say about themselves?

These questions are most effective early in the interview before the respondent has become too educated about the site and the company. Their initial reactions to the site will give you the best indicator of the image the site is communicating. | Q



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A mix of high-tech and old-tech

Conducting marketing research among physicians can be a daunting task. An online data collection methodology for survey research is ideal, allowing a busy group of respondents to participate at their convenience. However, it is the premise of this article that the Internet or e-mail is often not the best way to recruit physicians. The most effective recruitment method is a frequently overlooked communication tool — the fax machine.

Simply because you're using the Internet as your data collection medium does not necessarily mean you need to restrict your sample-contacting activities to the Internet. While there are both sound reasons and appropriate studies that justify recruitment via the Internet or an opt-in targeted sample list, we have found that these methods do not work well with the physician respondent.

Physicians are a unique breed of respondent, with their own set of preferences and values when it comes to marketing research. Not only are they busy professionals, they are virtually unrivaled in the sheer number of separate interests vying for their attention in a given day. Start with a full schedule of patient visits, often booked two or three at a time at 15-minute intervals, add in nurses, phone calls, emergencies, peer requests, the ever-present sales rep visits, and it's easy to see that a request for a survey will not even register a blip on the radar screen.

Recruiting methods

When recruiting physicians for online research, don't overlook the fax machine

Recruitment techniques can take the form of either traditional or online. Traditional recruiting refers to recruitment via postal mail, the telephone or fax, while online recruiting encompasses e-mail, online banner ads, targeted pop-up windows, or other Internet-related methods. How do these methods stack up in physician research? Beginning with traditional recruiting, we can eliminate the mail recruit for obvious reasons. Phone calls to a doctor's office do not get past the gatekeeper. Anyone who has attempted to speak with a doctor about his or her own health over the phone can attest to this. Imagine the futility of calling Dr. X's office asking to speak with him to discuss a survey. Even an attempt to "sell" Dr. X's receptionist on the merits of your survey research effort will not make you worthy of the doctor's time. Our executive interviewers/recruiters, we think, are

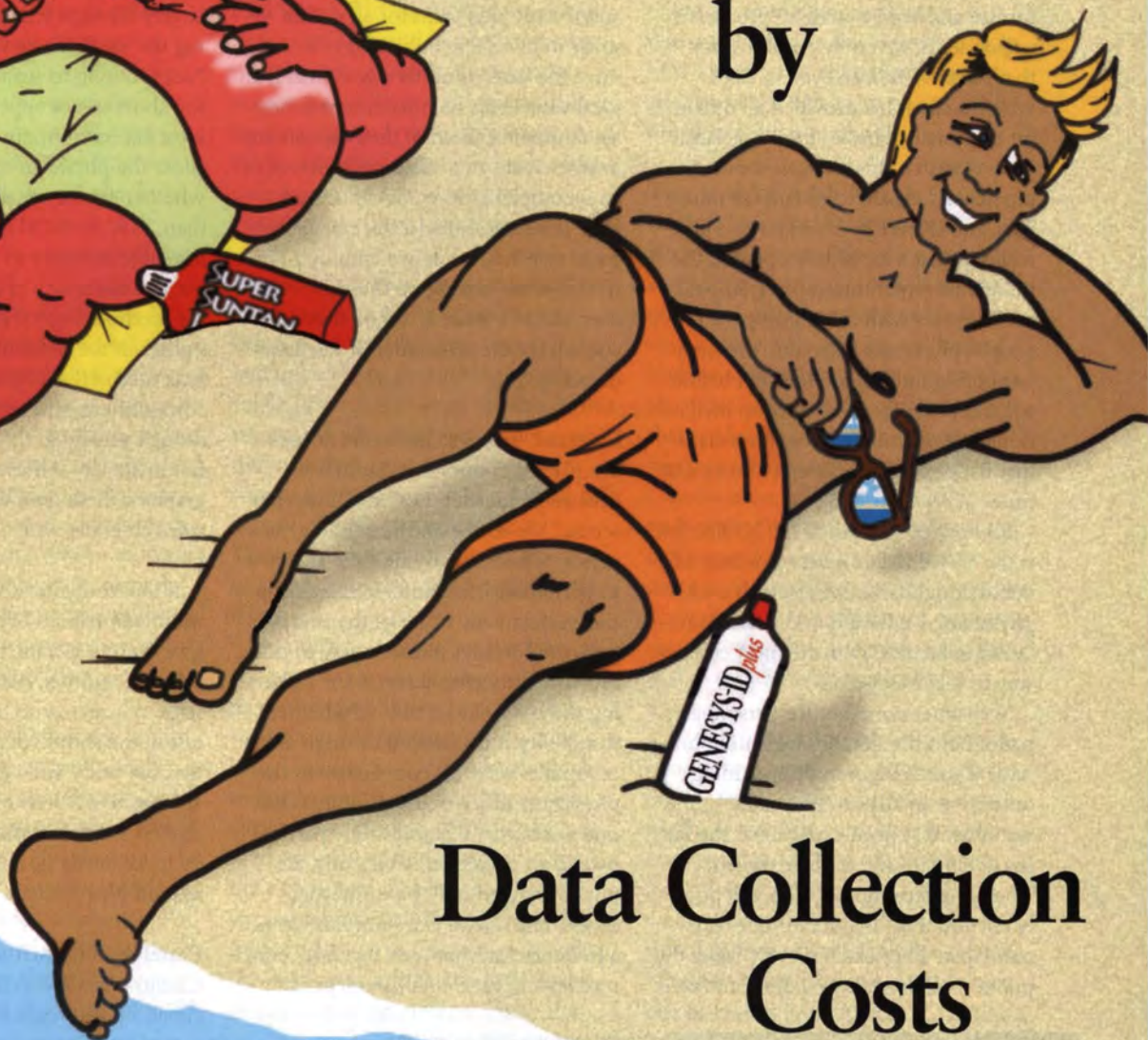
Recruitment techniques can take the form of either traditional or online. Traditional recruiting refers to recruitment via postal mail, the telephone or fax, while online recruiting encompasses e-mail, online banner ads, targeted pop-up windows, or other Internet-related methods. How do these methods stack up in physician research? Beginning with traditional recruiting, we can eliminate the mail recruit for obvious reasons. Phone calls to a doctor's office do not get past the gatekeeper. Anyone who has attempted to speak with a doctor about his or her own health over the phone can



By Lynn Welsh

Editor's note: Lynn Welsh is vice president of the Olson Research Group, Inc., Ewing, N.J. She can be reached at 609-882-9888 or at lwelsh@olsonresearchgroup.com.

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among the best at their jobs. Even in our lofty estimation, we would not put money on the odds of getting past the receptionist in attempting to win Dr. X's participation.

E-mail recruiting generally refers to contacting sample via an opt-in list. Though we have an in-house broadcast e-mail capability that allows us to customize and send e-mails to prospective respondents, we rarely employ it for that purpose. In fact, even in cases where a client has provided an opt-in list of e-mail addresses for physicians, we will match this list against our physician database to obtain fax numbers, and recruit in this manner. The reality is that a list is only opt-in if the individual remembers opting-in. And, as is the case with other groups of busy people, physicians often don't remember opting in. Further, Internet banner ads and other forms of pop-up invitations will only reach those physicians that happen to be online at a particular time.

So how do you reach Dr. X? The fax is the answer. After nearly a decade of conducting marketing research with physicians, we have found a faxed invitation is, hands down, the most efficient way to reach a doctor.

Well-intentioned office personnel patrol both the doctor's mail and phone with as much vigor as drug-sniffing hounds in an airport. Remarkably, and we know this from experience, the fax has been immune to their vigilance. The same receptionist who will politely tell you that "the doctor does not participate in research surveys" over the phone, will promptly escort your faxed

recruitment letter into the doctor's office and place it on top of his desk for his review. Why? The fax is a "soft sell," requiring neither a decision nor further action on the part of the often over-worked receptionist.

Through the use of broadcast fax technology, coupled with our in-house physician database, we are able to target and recruit physicians for an online study in just a few hours. Of course, once the study is underway, e-mail is an ideal vehicle for recontacting individuals, reminding them of their agreement to participate, or as fieldwork ensues, of an incomplete survey, or other study-related information. In the case of our panel research, while we employ a fax recruit when setting up the panel, we then utilize e-mail as the method of contact for the remainder of the panel's duration.

Internet user vs. Internet access

We place an important distinction between "Internet user" and "Internet access." We define an Internet user as a person who regularly uses the Internet to correspond, find information, shop and perform any other of the myriad tasks the Internet makes it easy to do. However, Internet access refers to having the ability to go online, whether that ability is manifested through a computer network connection in the physician's office or via a family computer at home. To successfully participate in an online research study, the physician need only have Internet access. The doctor does not have to be a frequent Internet user: regularly communicating via e-mail, or adept at

search engine usage. He simply must be able to, once notified, connect to the Internet and click on the study link provided. A fax recruit simply levels the playing field between these two groups.

Every word counts

We have become experts, admittedly largely through trial and error, in crafting the ideal doctor recruitment fax. Not too long to waste time, but not too short to not appear legitimate. The ideal fax recruitment letter should allow the physician to read and decide whether or not to participate in less than 20 seconds. Mention enough of the subject matter to arouse interest, but not too much as to compromise the methodological soundness of the study. List the three most important facts succinctly: subject matter, time commitment, and incentive amount, though usually in the reverse order. Eliminate any unnecessary color and graphics; these tend to align your research effort with a sales or marketing piece.

If the study dictates that respondents must be screened over the phone first, give them a specific name to call, and a toll-free number. Mark the fax with a sense of urgency so that it doesn't get lost in the shuffle of paperwork — state that the study will close when quotas are reached. If screening will be conducted online, list the Web address and include username and password information if necessary.

Panel vs. custom study

Clients often ask us if we have standing panels in place consisting of particular specialties of physicians. While we regularly create and maintain custom online physician panels for clients, we do not set up the panel in anticipation of the research. Our panels are created for a particular client's use, at the time of the research. We do not set up a panel, and then wait for a need to implement it. This, in the realm of physician research, would be to put the cart before the horse.

For custom studies, it is far more efficient to recruit a group of doctors for a client than maintain a panel of a particular specialty of physician for a period of time until a client has a need for it.

Socratic animates Web survey tasks...

Boring Web Surveys Not Cutting It?

The Socratic WebComm ToolsetSM is a suite of brand assessment tools that are useful for testing advertisements, packaging



design, graphics and other elements of marketing communications and brand messaging.

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All of these tools are fully compatible with the Socratic Web Survey 2.0SM system, which means that all tests may be preceded or followed by in-depth profiling or other questionnaire-based lines of inquiry.

More information and animated demonstrations of the WebComm technology can be found at Socratic's Web site at www.sotech.com.



The reason? The capacity of even the most well-intentioned physician to remember signing up to participate in periodic research at some as yet undetermined date is, understandably, quite small.

Thus, for us to expend the energy and manpower required to recruit and set-up a panel of, say, 200 cardiologists for a one-time study, is largely a futile effort. If three weeks or more passes between the time the physicians have been recruited and the survey being ready for fieldwork, most will have either forgotten their commitment to participate or simply do not check their e-mail regularly enough to receive the request in a timely fashion. As a result, an e-mail to the group announcing there is now a survey for them to complete falls largely on deaf ears. A substantial amount will either delete or simply ignore the e-mail, and a certain percentage (depending on the duration of time between the two events) will reply inquiring as to how we obtained their e-mail address (even though they called our offices and happily gave it to us a few weeks earlier), further requesting that we promptly take them off our list. Some even mention the industry's four-letter word: spam.

It is a much smoother process for us, and for the physician, to traditionally recruit from our physician database via fax when an appropriate study is available. Study parameters dictate the number and type of physician needed for the research. A study database is derived from our master physician database. A one-page fax invitation is broadcast to enough physicians to fulfill

the study requirements, generally allowing for a 10 percent over-recruit for any dropout participants. Interested physicians call us to be screened and added to the research effort. They are informed that an e-mail will follow shortly including all the pertinent study information and an active link to the survey. Less than 24 hours later, the e-mail is sent. Participation rates are high. Physicians are satisfied; our fax contact is fresh in their minds, and we have already fulfilled what we promised in sending the study e-mail promptly. And satisfied respondents come back, potentially giving us a head start on the client's next custom research project.

Eliminating bias, real or perceived

Despite the proliferation of the Internet, there still exists some bias to, and uncertainty in, reaching people solely through an e-mail address. In this regard, the physician respondent is no different than any other. This bias, in some cases, will be real. In others, it will be your client's perceived threat. Traditional recruiting ensures that any bias, real or perceived, is largely eliminated.

By utilizing a fax as our method of contact, we are not limiting our recruitment to those physicians that connect to the Internet on a regular basis. Considering the speed at which online studies, particularly those with sample requirements of just a few hundred, are fielded, they may be in and out of the field in a few days. Should we opt for an e-mail recruiting strategy for a study such as this, we are, in effect, biasing our sample by the very nature of our recruiting method. Those doc-

tors that check their e-mail two to three times a week or more will be the ones that participate in this research. Those that check for e-mail less frequently, and it can be argued that these are the busiest, highest-profile, or "opinion leader" physicians, will be excluded. Bias by recruitment method, in many cases, is unavoidable and a fact of life in conducting marketing research. However, this is one example of where it is not only avoidable, but also the better option, to rely on traditional recruiting methods.

The best of both worlds

In physician marketing research, when you use traditional recruiting methods and couple them with the speed and efficiency of an online survey, you are truly getting the best of both worlds. You are capitalizing on all of the merits of the online survey that we know so well: speed, convenience and low cost, while employing a much more efficient recruiting technique. By casting our recruiting net beyond the group of Internet users to those with Internet access, we are bolstering the validity of our sample, and virtually eliminating the bias that may exist with the Internet medium.

This article relates our experience conducting physician research over the Internet. While its premise may not hold true for consumer research, one could argue that the best practices discussed here would translate well when surveying other professional or executive-level respondents, whether in the pharmaceutical, financial or technology fields. | Q

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A guide to success

Mystery shopping, also known widely as performance assessment, is a form of participant observation — using trained customers and/or potential customers to observe the processes and procedures used in the delivery of a product or service. Unlike the methodologies employed in mainstream, conventional market research, mystery shopping seeks to measure the service delivery process rather than the service outcome. The emphasis is on what did or did not occur as the service process unfolded, rather than on impressions, attitudes or opinions about the service experience per se.

Establishing service delivery process standards and measuring actual performance against these standards is becoming a critical task for retailers who wish to maintain and, more importantly, grow their brands in domestic and global marketplaces. Global spending on mystery shopping is estimated to be in excess of \$500 million in 2004. The methodology is used in almost all major retail markets that touch the consumer: automotive, food service (quick-service and fast-food restaurants), wireless telecom, retail products and services, financial services, petroleum stations, convenience stores, travel and leisure and, believe it or not, local and federal government retail agencies.

Mystery shopping is gaining widespread acceptance as a mainstream management tool for measuring — from the customer perspective — the service delivery performance of an organization, thereby enabling drivers of both employee and customer satisfaction to be better understood — and better managed.

Keys to implementing your mystery shopping program

The case for mystery shopping

The use of mystery shopping has developed largely on the back of what is plain common sense — that understanding and meeting customers' expectations is good for business. Customers don't buy products or services, they buy results. In any business activity today the most important competitive advantage a

company can achieve is excellence in its service delivery process performance. Excellent service will differentiate otherwise similar competitors in a way that is important to customers.

But services are often intangible: they cannot always be measured, tested and verified in advance of sale to ensure quality because the production and consumption of services are inseparable. Thus services differ from products in that quality occurs during delivery. And, unlike manu-



By Chris White

Editor's note: Chris White is CEO of NOP World Mystery Shopping, New York. He can be reached at c.white@nopworld.com.

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facturers, service providers do not have a factory to act as a buffer between production and consumption — making the service delivery process especially critical.

Services are also heterogeneous: the quality of the interactions between customers and frontline staff can rarely be standardized to ensure uniformity — in the way, for example, the quality of goods produced in a factory can. The level of interaction, and of customer involvement, makes it difficult to control service quality, while the higher the level of customer interaction, the greater the impact on customer satisfaction (in a supermarket the level of interaction may be low but in a restaurant or call center it is very high).

It is the processes that directly touch the customer (face-to-face, over the counter, on the phone) that are the main contributors to what customers value most and that lead to satisfaction. But the service delivery process is like a chain: only as good as the weakest link. Management must focus on finding the weakest link and uncovering those

activities that inhibit the perceived, as well as the actual, performance of the organization. But this can't be achieved without input from the person most affected by the processes that touch the customer — the customer! The voice of the customer will identify which activities contribute to customer satisfaction and add value.

Any organization interested in delivering quality service must: monitor customers' perceptions of service quality; identify the causes of service quality failures; take appropriate action to correct failures.

The criteria used by customers in judging service quality are likely to include:

- credibility — trustworthiness, honesty, believability;
- security — freedom from danger, risk or doubt;
- tangibles — appearance of the premises and staff, etc.;
- access — approachability and ease of contact;
- courtesy — politeness, consideration, friendliness and respect;

• communication — listening to customers and keeping them informed in a language they understand;

• understanding — making the effort to know customers and their needs;

• responsiveness — willingness to help customers;

• competence — possession of the skills and knowledge required to perform the promised service;

• reliability — dependable and accurate delivery of the service promise.

These criteria are overlaid with certain core values that influence customer perceptions of the service delivery process when it involves direct contact with frontline staff: tone of voice; facial expression; body posture; grooming; teamwork; empowerment.

Measuring factors such as quality, cost, and asset utilization is straightforward — and objective measures can be used effectively to monitor performance. Measuring the performance of the service delivery process can be done effectively only through the eyes of the customer.

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Supplying mystery shopping services

The market for mystery shopping programs has grown significantly over the last 10 years, but so has the number of mystery shopping providers, all now operating in an increasingly competitive market. The Mystery Shopping Providers Association has more than 150 members worldwide. In addition there are as many as 1,000 other companies providing mystery shopping services in the U.S. alone.

Implementing large, complex mystery shopping programs is no longer an activity that traditional market research organizations can simply bolt on to their existing portfolio of services. The barrier to entry is significant. Potential mystery shopping suppliers must be willing to invest heavily in technology, management expertise and online communities to ensure they can fulfill the key prerequisites for today's discriminating mys-

tery shopping clients. These clients expect and demand high-quality, timely, meaningful and actionable data that is available 24/7 in detailed and rolled up reports that can quickly identify strengths and weaknesses. Indeed, some traditional market research and private investigation organizations claiming mystery shopping expertise may not actually have the necessary processes in place to be regarded as suppliers for large complex mystery shopping services.

Mystery shopping techniques include face-to-face, telephone, Internet and video assessments. While not all suppliers provide all these services, a number have specialized even further, for example in the recruitment of disabled shoppers.

The following summarizes some of the key components that mystery shopping providers and their clients must consider in designing and executing successful mystery shopping programs.

Questionnaire design

The logistics of even a small-scale mystery shopping program are complex. Based on an understanding of the information needs of the client organization, providers must ensure that subjective as well as objective issues are assessed in a way that is both flexible in coverage and useful to all levels of client personnel.

Shopper selection and training

A broad panel of mystery shoppers trained in both generic and program-specific skills is a prerequisite for any supplier. Training resources need to focus on ensuring that all shoppers are familiar with the techniques of detailed observation, memory retention and recall. Further, the recruitment of a broad geographic and demographically representative panel is critical as clients segment customers and look to match shoppers against specific customer profiles.

Quality control

From shopper recruitment through selection and training, fieldwork monitoring, data checking and report publication, quality control procedures vali-

dating data and shopper performance must be rigorous and detailed.

Reporting

Mystery shopping providers are obliged to design a hierarchical suite of report formats with content geared for different audiences — the information needs of headquarters management are markedly different from field management, and frontline staff management! Mystery shopping programs must generate information that can be easily interpreted and quickly acted on by the reader. This means that the report design, content and distribution must reflect the needs and functional responsibilities of individual readers, be they frontline staff, field management or corporate management.

For maximum benefit, program findings should be integrated with results obtained from other information sources (such as complaint rates, revenue per square foot, customer satisfaction and competitive surveys), in order to maximize potential benefits and correct weaknesses that may originate out-

side the service delivery process itself. There should be a continuous linking of facilities, systems and procedures with service standards, staff performance, training and reward mechanisms.

The future?

We see the mystery shopping industry developing along two distinct paths. Small suppliers will continue to collect service performance data, usually at a local or regional level and possibly with the addition of simple summary reports. Larger suppliers are doing this now along with offering services such as interpreting data in order to provide reports and educational materials designed to change the service delivery behaviors of frontline staff. Some companies in the mystery shopping sector are now integrating service performance data along with other forms of research and operational information, thereby providing management with a dashboard-like tool to monitor and manage their customer's experience in the retail channel. | Q

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Survey Monitor

continued from page 8

zero tolerance for new technologies that don't meet their needs."

The self-checkout lanes research was featured in the November issue of *Facts, Figures & the Future*, a monthly e-newsletter published by ACNielsen, the Food Marketing Institute, and Phil Lempert. To view the issue and obtain a free subscription visit www.factsfiguresfuture.com.

Vegetarian food market grows

According to Chicago-based Mintel's research, Americans aged 18 to 24 years old are three times as likely than the general population to follow a vegetarian diet, with only 2 percent of the general population saying they don't eat meat or seafood. Among respondents in the oldest age group (65 and older), while they had a low penetration of red meat eaters, they were significantly more likely to eat fish or seafood. This is likely a factor of the increased need to monitor cholesterol, fat and calorie intake, and a move to a lighter diet. In regards to the general population, 10 percent of Americans say they do not eat fish or seafood.

Vegetarians are much more likely to exercise than those who do not agree with the statement "I am a vegetarian." Nearly 70 percent of vegetarians say that they "make sure to exercise regularly," in comparison to 38 percent of those who are not vegetarians. In addition, vegetarians are almost twice as likely as all respondents to snack on healthy foods.

More than one-third of Americans consume some type of vegetarian food, with meatless meat products having the highest level of uptake among respondents. Prepared vegetarian meals were consumed by nearly one in five respondents, which could reflect the trend toward interest in convenient, healthy and easy-to-prepare meals.

The vegetarian food market in the U.S. has grown rapidly over the past five years, from \$646.7 million in 1998 to \$1.6 billion in 2003. Mintel

predicts that the market will grow another 61 percent to reach \$2.5 billion by 2008.

The market for vegetarian foods, fueled in part by the explosive growth of refrigerated daily alternatives such as soy milk, has evolved well beyond its incubator of health food stores. In the food subcategory of the vegetarian market, the segment to post the most significant growth is frozen meat substitutes, increasing nearly 18 percent in the two-year period, and which also commands 73 percent share of the vegetarian foods subcategory. Refrigerated dairy milk alternatives (primarily soy milk) showed the strongest growth of all vegetarian food and drink covered here from 2001 to 2003. This is likely at the expense of its shelf-stable counterpart, which posted a 3.3 percent loss compared to a 68 percent jump for the refrigerated segment of dairy milk alternatives. For more information visit www.mintel.com.

Buyers rely on ad inserts

Baltimore-based marketing firm Vertis has announced the results of its Customer Focus 2004: Ad Inserts study, which for the first time shows that advertising inserts are most likely to influence a consumer's buying decisions and are the most popular form of media that shoppers turn to when looking for help with their purchasing decision.

"Ad inserts have been around for over 30 years and they've always been influential, but our new survey shows that consumers increasingly are being drawn to this medium," says Thérèse Mulvey, vice president of marketing research at Vertis. "With less time on their hands and less money in their wallets, a growing number of shoppers are seeking out the best deals before they leave the house to go shopping. Now, more than ever, retailers and other marketers should consider including advertising inserts in their multi-channel marketing programs."

Additional findings from the Vertis Customer Focus 2004: Ad Inserts study include:

- 85 percent of those surveyed confirmed that they use ad inserts in some form, up from 82 percent in 1998.

- 90 percent of women now read ad inserts, an increase of 4 percent from 1998.

- Consumers are most likely to use advertising inserts when they are deciding where to shop for clothing (56 percent), followed by groceries (52 percent) and home electronics (50 percent).

- When it comes to consumers' buying decisions the most influential media are ad inserts (28 percent), TV (22 percent) and ads on the page of a newspaper (18 percent).

- The popularity of ad inserts has increased by 8 percent among men since 2002 (16 percent to 24 percent).

- 30 percent of those surveyed said that when they're ready to make a purchase they turn to advertising inserts first, compared with ads on the page of a newspaper (18 percent) and TV (10 percent).

- Women aged 18-34 and 35-54, and men aged 35-55 and 55+ all made ad inserts their first choice.

- For the first time, more respondents said they read an insert in the past week than listened to morning drive radio (69 percent vs. 67 percent).

- Readership of ad inserts has increased from 61 percent in 2000 to 69 percent in 2004.

Customer Focus, commissioned by Vertis, is a biannual survey tracking consumer behavior across a wide variety of retail settings including automotive, grocery, department and discount stores, the Internet and specialty retailers. The survey was first conducted in 1998. In subsequent years, the study has been expanded and modified to identify emerging consumer behavior patterns and track shifts in consumer practices and motivations. For more information visit www.vertisinc.com.

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would like to see looser regulation. Those responsible for regulating financial services receive a so-so, or moderate, rating, 43 percent positive, 43 percent negative. These are replies to two new questions asked in the annual Harris Poll about Wall Street. It is based on a nationwide telephone survey of 1,017 adults surveyed by Rochester, N.Y.-based Harris Interactive between October 14 and 19, 2003.

The trended questions show that there has been a modest improvement in the public's perceptions of the people who work on Wall Street. They are still very negative but somewhat less so than 2002. By a substantial 68 percent to 16 percent majority, most Americans continue to feel that, on balance, Wall Street benefits the country rather than harms it, while they also hold many critical views about the people who work on Wall Street.

For example:

By 54 percent to 34 percent, a majority believes that people on Wall Street would be willing to break the law if they believed they could make a lot of money and get away with it. However, this is down from 61 percent who felt this way in 2002.

By 51 percent to 36 percent, they believe that Wall Street is dominated by greed and selfishness, but here again, this is an improvement from the 57 percent who felt that way in 2002.

Only a minority, 35 percent (unchanged from 2002) believe that in general people on Wall Street are as "honest and moral as other people."

These results presumably reflect the good and bad news coming out of Wall Street recently, including continuing investigations of wrongdoing but also a big improvement in share prices. For more information visit www.harrisinteractive.com.

Companies are innovating more with less

The landscape of innovation in America is shifting. The peaks and valleys of revolution are giving way

to the interconnected roadways and rivers of well-designed solutions, according to a study by San Francisco-based strategic consulting and research firm Cheskin and Fitch:Worldwide, an international brand and design firm.

The change is deliberate and well-funded, as corporations have increased their budgets for innovation, but learned to spend smarter. Rather than pushing their R&D lab to "just invent something new," executives are casting a keen eye on meeting rapidly evolving customer needs. The most effective ones have refined their innovation process to be highly responsive to changing market conditions, widely collaborative throughout their organization, and focused on core competencies. Surprisingly, these very actions that might seem counter to inspiring the creative spark have the opposite effect. These are companies where innovation grows and thrives with less effort and greater rewards.

The study surveyed over 500 senior business executives across the U.S. in a range of industry sectors, asking them in-depth questions on their companies' innovation practices, including specific approaches, level of authority and leadership, spending trends, success metrics and the influence of major industry trends. The 35-page report, *Fast, Focused & Fertile: the Innovation Evolution*, is available free online and can be downloaded from www.cheskin.com or www.fitchworldwide.com.

The study's top findings include:

Rebellion is out, relating is in. Twenty-six percent of companies define innovation as "a solution" that identifies and addresses the unmet needs of consumers. Very few associated innovation with a more likely term such as "discovery" or "revolution."

Tech companies out-innovate everyone. Microsoft was cited most frequently as one of today's most innovative companies (137 mentions) in unaided open-ended responses, followed by Dell (47 mentions), Apple (40 mentions). The only

non-tech companies to make it on the Top 10 list are Wal-Mart (38 mentions) and Daimler Chrysler (21 mentions).

Innovation budgets are not routinely being cut. In spite of the recession and sluggish economic recovery, over half (54 percent) of the executives surveyed indicated that their companies have increased investment in innovation over the past two years.

Creativity counts, but the customer is the judge. Bottom-line accountability is driving a practical and customer-focused approach where success is judged by sales (51 percent), revenue and customer satisfaction.

Some sectors seek to please, while others think first, then act. Retail, manufacturing and consumer goods industries put much of their emphasis on understanding the customer and a focus on quality; service industries felt more tied to strategy and planning, as did technology firms who also sought leadership.

Trends are crucial, but few know how to harness them. Sixty-five percent of companies committed to innovation monitor or track trends within their industries. However, while giving these trends a high level of importance, their role in the innovation process is ill-defined.

Tree-huggers are gaining ground. Sustainability — defined as meeting the needs of the present generation without compromising the ability of future generations to meet their needs — tops the list (31 percent) of trends that companies are most focused on today.

The report contains results gathered from three phases of research including internal interviews and expert interviews with innovation leaders at companies including Coca-Cola, Maytag, Ford Motor Company and Meredith Corporation. The focus of the research was an online survey conducted in July 2003 with 544 executives with senior decision-making authority. Respondents were spread across the U.S. A full range of industries and company sizes was represented.

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Product and Service Update

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load is available at www.xlminer.com.

Conjoint tool from Moskowitz Jacobs

White Plains, N.Y., research firm Moskowitz Jacobs Inc. has issued a new release of IdeaMap.Net, a self-authored conjoint tool for developing product concepts and marketing and advertising programs. Once users enter the test elements of a product or communication, IdeaMap.Net's technology will place these elements in dozens of different combinations for consumers to rate. The quantitative data ultimately reveals the most preferred elements, based on a mathematical model. Tests can be conducted globally, currently in 15 languages (more are being added).

Marketers can test ideas online with consumers via Conjoint, ConScreen (concept screening) or basic Questionnaire modules. In the Conjoint and ConScreen modules, tested ideas are presented to respondents in a randomized order to prevent bias. Testers can see data accumulating in real-time reports as a study is underway. At conclusion, IdeaMap.Net will generate summaries plus provide the raw data for additional analysis. For more information visit www.mji-designlab.com.

System lets users work with sample from several sources

U.K.-based Pulse Train has announced an alliance with Centurion Marketing Systems, suppliers of MARSC, a scalable solution for management and control of project-based research sample. The firms' integrated system organizes sample derived from a variety of potential sources, such as CRM systems, corporate data warehouses and other external sources. It allows sampling rules to be applied, to extract representative subsets of the data, and passes these sample records to Bellview Fusion, for Web or CATI (or mixed-mode) interviewing. Bellview Fusion is able to report back to MARSC the dispo-

sition of the sample, thereby completing the loop and allowing for oversight of the sampling process.

MARSC has been designed to work with both event-driven and ad-hoc projects. For more information visit www.pulsetrain.co.uk.

Retail sourcebook from Trade Dimensions

Wilton, Conn.-based publisher Trade Dimensions International Inc. has released its 2004 High-Volume Retailers - The Alternate Channel Sourcebook, a new reference dedicated to the fast-turn, high-volume world of alternate channel retailers, covering supercenters, wholesale clubs, discount stores, dollar stores, drug stores, department stores, category killers, specialty retailers and military buying centers. It features over 600 U.S. and Canadian company profiles, including the names of more than 4,500 key executives. This information is extracted from the Trade Dimensions Retail Database. For more information visit www.tradedimensions.com.

NetReflector updates InstantSurvey

Seattle-based research software firm NetReflector, Inc. has released InstantSurvey 4.4, the latest upgrade of its online survey application. New features include a redesigned distribution management control panel, distribution templates, draft distributions and an HTML invitation template.

The new distribution management user interface, consisting of a control panel with tabs, is designed to increase flexibility and provide users with better visibility into the status of their online survey distributions. This includes a toolbar that shows distribution status at a glance and a status tab that provides a graphical display of response statistics.

New distribution templates allow users to reuse distribution settings the next time they create a distribution, edit these templates and share them with members of their group.

Users can now set up sophisticated distributions over time, rather than all

in one session. This is accomplished by saving the distribution as a draft distribution and returning to it later to continue working on it. Simple distributions can still be made using the step-by-step distribution wizard. For more information visit www.netreflector.com.

New version of Inquisite

Austin, Texas-based Inquisite has released Inquisite 6, an automated Web survey system. This latest version of Inquisite offers data pre-population capabilities, a new response editor, advanced data-sharing, and enhanced templates and styles.

The pre-population feature allows users to import data into a survey from an external data file (.csv, .txt) and map it to the survey content. In addition, they can choose to show answers to those questions or hide them from respondents. This feature allows personalization of surveys and makes data, such as demographics, available for reporting without actually asking respondents for the information.

A database editor offers administrators the ability to manage data once responses have been received. Users can edit individual responses, batch updates for groups of respondents and delete respondents from the database.

Inquisite's data-sharing capabilities allow administrators to give others in an organization the ability to access data that was previously only available to the owner of the survey. The dataset also can be constrained by allowing the sharing of specific data with specific users.

The enhanced templates and styles of Inquisite allow a survey administrator to change the entire look of a survey instantly and consistently, since all fonts and colors for questions, tables and text are aggregated into styles. Templates also have styles defined for each type of control, such as question, table and text label. For more information visit www.inquisite.com.

Long form version of NCDB

GeoLytics, Inc. has released The Long Form Version of the Neighborhood

Change Database (NCDB), which will allow users to access Census data from 1970–1980–1990 and 2000 all on one disk. The updated Neighborhood Change Database expands on the earlier version by adding nearly 2,500 new variables. The NCDB upgrade has about 1,800 variables from the 2000 Census Long Form. In addition, it has over a thousand variables from each of the 1970, 1980 and 1990 Long Form Censuses. These data sets are available in their year-specific boundaries as well as being normalized to the 2000 boundaries for comparisons of the areas over the 40-year time period. For more information visit www.censusdata1.net.

Shared-cost study looks at Boomers and their elders

Strategic Directions Group, Inc., St. Paul, will conduct its eighth shared-cost, industry-specific studies on Baby Boomers and their elders during the first quarter of 2004. The basic package includes a half-page for a participating company's own proprietary questions, as well as shared data from a 16-page questionnaire covering behaviors related to health, real estate/finance, food, travel, demographics, and Internet and media usage. The data is conveyed in a custom set of approximately 500 cross tables. Beyond the basic fee, other deliverables include the purchase of additional half-pages, questionnaires sent to a client's own proprietary sample, a report, and a presentation on the data. Each study also incorporates seven of the psychographic segmentation strategies on Baby Boomers and their elders developed by Strategic Directions Group, Inc. These psychographic segmentation strategies include health, health compliance and health information, travel, food, lifestyle and finance. For more information visit www.attitudebase.com.

New online product for CPG marketers

New York-based NetRatings and ACNielsen U.S. have launched Homescan Online, a new service

designed to improve the effectiveness of online marketing for consumer packaged goods (CPG) marketers and Web publishers. Homescan Online will utilize 12,000 members of the ACNielsen Homescan consumer panel who have opted in to the service, allowing their Internet behavior to be monitored with Nielsen//NetRatings technology as they record their offline buying behavior with ACNielsen's proprietary in-home UPC code scanners.

Homescan Online will show CPG marketers the Web sites that category or brand buyers are visiting, giving them a better understanding of consumers' online behavior and helping them place more efficient media buys. Then it will help evaluate the effectiveness of online advertising campaigns by measuring actual offline purchasing behavior among consumer groups who were exposed to the advertisements. The service will also enable Web publishers to market themselves to the CPG community by helping consumer product marketers target Web site audiences by their specific brand consumption.

Homescan Online will integrate consumer retail purchasing of up to 12,000 CPG brands and online visits to more than 1,000 Web sites. Initial custom analysis from Homescan Online is expected to be available in January. Full reporting through 2004 will include quarterly Web surfing data with annual all-outlet purchasing data. For more information visit www.nielsen-netratings.com.

Automated conjoint product from InsightExpress

Stamford, Conn.-based research firm InsightExpress is now offering an automated conjoint analysis solution. Using InsightExpress' technology, marketers and researchers can create their first conjoint survey in minutes, field the survey online, and make business decisions through a browser-based "what-if" simulator driven by consumer preferences. In addition to the "what-if" preference simulator, the product identifies the attributes of the top 15 most- and bottom 15

least-preferred products — enabling marketers and researchers to quickly identify winning products. For more information visit www.insightexpress.com.

Briefly...

SMG/KRC Millward Brown Poland has launched Double Agent, a new methodology based on a combination of mystery shopping and human resources experience, to provide professional advice to clients on how to resolve customer relationship problems. For more information visit www.millwardbrown.com.

Q Research Solutions, Inc., Old Bridge, N.J., has opened its second consumer product testing facility. The new facility, which is owned and being operated by Focus & Testing, Inc., is located in Woodland Hills, Calif. Focus & Testing will duplicate the Old Bridge, N.J. consumer product-testing site. The new 3,500-sq.-ft. facility includes: six testing rooms; fragrance exhaust; multiple product placement rooms; and a local consumer panel. For more information call Laurel Moller at 732-952-0000 or visit www.whoisq.com.

Reston, Va.-based comScore Networks has launched comScore Survey Solutions, a new business unit offering survey-based research services via a panel of more than 1.5 million consumers.

Minneapolis-based Modern Survey has introduced the i-measure Suite, a set of self-service survey modules that enable businesses to self-manage employee or customer survey projects. The first i-measure modules center on both employee and customer survey solutions. Employees, current customers and market research customer panel members are offered unique and anonymous access to online surveys. Interim participation rates and real-time results can be monitored, analyzed and reported. For more information visit www.modernsurvey.com.

Research Industry News

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Society's recent policies, particularly in the area of professional development. The second Honorary Fellowship was awarded to Richard Webber, who applied cluster analysis to the 1971 U.K. Census to study inner city deprivation. He saw the potential of area classifications for market research and took his first classification of residential neighborhoods, named ACORN, to the market research community. This led to the birth of the geodemographics industry in the U.K. and Webber is regarded as its founder. He subsequently also developed the MOSAIC classification. For their exceptional contribution to the market research industry, nine new MRS Fellowships were also awarded to: Don Beverly, Susan Blackall, Heather Dunn, Stephen Ellis, Sally Ford-Hutchinson, Kathleen Hamilton, Jonathan Jephcott, Corrine Moy and Richard Roberts-Miller.

Awards/rankings

The winners of the John and Mary Goodyear Award of Best International paper were presented at The European Society for Opinion and Marketing Research's qualitative research conference in November. The top paper was "Research for innovation: fitting the design process at Philips Design," by Monica Bueno and Lucile Rameckers, **Philips Design**, Netherlands. Also winning was a paper titled "The 'true' inner self: a qualitative assessment of the Mexican consumer's psychological and cultural anthropological construct," by Carol Culebro Stewart, **Ford de México**, Mexico; Michael Francesco Alioto and Amy Routhier, **The RDA Group, Inc.**, U.S.; and Jorge Cherbosque, **The Global Consulting Group**, U.S.

Information Tools won the MRS/ASC Joint Award for Technology Effectiveness for its Harmoni data analysis tool. The award is co-sponsored by the Market Research Society and the Association

for Survey Computing.

Flamingo International, a U.K.-based qualitative market research agency, was named Best Agency 2003 in the BMRA Awards for Research Business Effectiveness. Other winners in the awards, which are designed to recognize best practices among member companies of the British Market Research Association (BMRA) in the business of research, were Green Light International in the category of Innovation; Nunwood Consulting in the category of People Management (Smaller Agency); TNS in the category of People Management (Larger Agency); and Test Research in the Quality category.

New accounts/projects

Interviewing Service of America (ISA), Van Nuys, Calif., has chosen Seattle-based **TeleSage, Inc.** to provide it with telephone survey technology for a new exit polling system during the 2004 presidential primaries and the November 2004 general election. ISA, along with Universal Survey Research, won a joint contract in August from Edison Media Research and Mitofsky International to provide technology for gathering, tabulating and transmitting information on voter behavior for television and newspaper media outlets. In October 2003, ISA selected TeleSage's SmartQuest telephone survey software to gather and transmit information from precinct field interviewers.

New companies/new divisions/relocations/expansions

Global Market Insite has relocated its corporate headquarters to 2835 82nd Ave. S.E., Suite A, Mercer Island, Wash., 98040.

Braintree, Mass.-based **Perseus Development Corporation** has opened Perseus-Asia Ltd., a Singapore-based corporation, with funding provided by Perseus.

Company earnings reports

Paris-based **Ipsos'** consolidated revenues for the first nine months of

2003 came in at 400.9 million euros, up 7.3 percent on the same period of 2002. This improved performance is based on three factors. First, strong organic growth of 9.5 percent over the first three quarters of 2003. This growth was three times higher than that of the overall market. During the third quarter alone, organic growth reached 9 percent. Second, the positive impact of newly consolidated companies, which generated a 9.4 percent growth in activity over the first nine months of 2003. Third, persistently negative currency effects resulting from the translation into euros of Ipsos' revenues from all non-euro zone countries and regions (namely the U.K., central Europe, North and Latin America, Asia-Pacific and the Middle East). These currency translations had an adverse impact of 11.6 percent on Ipsos' total revenues for the first nine months of 2003, compared with a negative effect of 15 percent in the first half. At constant exchange rates, Ipsos' first nine-month revenues would have come close to 445 million euros, showing an 18.9 percent increase on the same period of 2002.

GfK Group completed the third quarter of 2003 with a 6.5 percent increase in sales to EUR 431.1 million and an overproportional increase in EBIT after income from participations of 50.5 percent to EUR 46.8 million compared with the same period in the previous year. As a result, GfK increased its margin of 7.7 percent at the end of the third quarter of 2002 to the present figure of 10.9 percent. Three factors were crucial to the overproportional increase in EBIT: rising sales and the exploitation of synergies in the Group's international network; high-margin acquisitions; efficient cost management.

In addition, lower expenses in net financial income and a lower tax ratio compared with the same period in the previous year resulted in the consolidated total income rising by 64.2 percent to EUR 24.0 million, more rapidly than EBIT.

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



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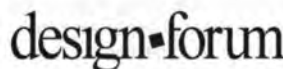
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Names of Note

continued from page 10

In line with a new organizational structure, VNU has named **Steven M. Schmidt** president and chief executive officer of ACNielsen and executive vice president of VNU Marketing Information. **Frank Martell** has been named chief operating officer of ACNielsen and senior vice president of VNU Marketing Information. **Brian Chadbourne** has been named president and chief executive officer of VNU Advisory Services, and executive vice president of VNU Marketing Information. Separately, VNU has named **Maarten Schikker** vice president corporate sustainability.

NOP World, New York, has named **Denise Teeling** chief financial officer.

Suzanne Johnson has joined GfK Custom Research Inc. as senior vice president and manager of its San Francisco office.

William Lawliss has joined Sports Research Partnership, a joint venture between SGMA International and Sports Marketing Surveys, as director of business development.

Meyers Research Center, New York, has named **Matthew Germain** vice president.

Pete Farrand has been appointed senior research associate at FDS International, a London-based research firm.

Paris research firm Ipsos has named **Alain Péron** managing director (France) of the company's quality and customer satisfaction division, Ipsos Loyalty. Separately, **Randall Emond** has joined the company as CEO of the Ipsos Forecasting, Modeling and Consulting global division, which includes the Ipsos-Novaction and Ipsos-Vantis modeling and forecasting practices.

John Birmingham has been named vice president/marketing

for Chicago Tribune. Marketing research will be among his new responsibilities.

London-based health care market research firm Isis Research announced that its 2003 graduate training program has now finished and that the 12 recruits have now joined their respective teams across the globe. Joining as junior research executives are: **Lindsay Thomas** and **Jennifer Yu**, who have joined the Isis Maryland team; **Gemma Calero Noves**, who has joined the Isis Spain team; **Cecille Plasabas**, from the Isis Philippines office and **Emily Sumner**, **Jennifer Bickett**, **Elaine Bonnici**, **Annabelle Gourlay**, **Nick Hedley**, **Pieter De Richter**, **Elizabeth Allison** and **Nicola Scott** have all joined the U.K. office.

Randall S. Smith has been named president and chief executive officer of comScore Survey Solutions, a new business unit of Reston, Va.-based comScore Networks.

2004

Mystery Shopping

Providers Directory



This directory was compiled by sending listing forms to companies that have advertised a specialization in mystery shopping. We list over 300 firms. In addition to the company's vital information, we've included the industries they mystery shop, the type of mystery shopping services they offer, be it full-service or just data collection, and the span of their services (international, national, regional or local). As an added feature, firms have been cross-indexed by the span of their services. The cross-index sections, which can be found at the end of the directory, list international mystery shopping firms alphabetically, national mystery shopping firms by country, regional firms by state, and local mystery shopping firms by metropolitan area. This directory is also available online at www.quirks.com.

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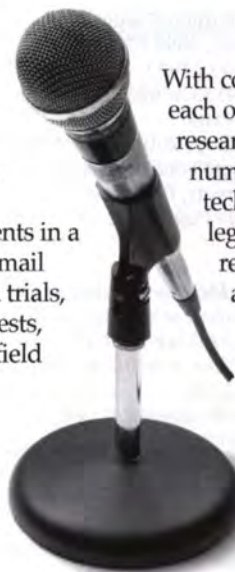
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Fax 416-778-8898
E-mail: rischristie@on.aibn.com
www.rischristie.com
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Rapid Research

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 Fax 207-942-6664
 E-mail: rapidresearchmai@aol.com
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Rast Marketing Research

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 Lilburn, GA 30047-4106
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 Fax 770-921-6510
 E-mail: annerast@bellsouth.net
 www.rmratlanta.com
 Ann Rast, President
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 B

RDAssociates, Inc.

257 E. Lancaster Ave., Suite 200
 Wynnwood, PA 19096
 Ph. 610-896-6272
 Fax 610-896-6306
 E-mail: rdouglass@rdassociates.com
 www.rdassociates.com
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 Seattle, WA 98125
 Ph. 206-364-9004 or 800-550-4469
 Fax 206-364-9025
 E-mail: realitycheckllc@home.com
 www.rcmysteryshopper.com
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Reflections Mystery Shopping

P.O. Box 241
 Oceanside, OR 97134
 Ph. 888-810-6330
 Fax 503-296-2826
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Research Inc.

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Research Strategies, Inc.

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Retail Biz Consulting

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Reyes Research

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Rocky Mountain Merchandising & Research

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Schlesinger Associates has been conducting mystery shopping for over 20 years. We have conducted mystery shops in banks, restaurants, retail establishments, automobile dealerships, etc. We have over three hundred mystery shoppers available across the country. (See advertisement on p. 11)

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Second To None offers robust solutions for understanding the customer experience across all touch-points, from in-person to online. Services include mystery shopping program design and administration, competitive benchmarking, analysis and secure, real-time reporting. Diverse shopper base profiled to your needs. National/international coverage. (See advertisement on p. 3)

The Secret Shopper Company

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E-mail: paige@secretshoppercompany.com
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Sensors Quality Management, Inc.

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David Lipton, President
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Serunian Investigations & Mystery Shopping

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Service Advantage International

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Plymouth, MI 48170
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Stephen J. Gill, Dir. Of Assessment & Training
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Service Alliance, Inc.

14826 E. Caspian Pl.
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Judi Hartleben, President
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Service Check.com

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E-mail: sales@servicecheck.com
www.servicecheck.com
Kelly Kasper
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Service Critique

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San Antonio, TX 78231
Ph. 210-492-9034 or 210-218-2011 cell #
Fax 210-492-6321
E-mail: ger2302@aol.com
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Service Evaluation Concepts, Inc. (SEC)

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Plainview, NY 11803
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Fax 516-576-1195
E-mail: inquiries@serviceevaluation.com
www.serviceevaluation.com
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Service Excellence Group, Inc.

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Marc Bikshorn, President
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Service Intelligence Inc.

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Fax 403-261-4999
E-mail: mdargie@serviceintelligence.com
www.serviceintelligence.com
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Service Intelligence champions the customer experience by combining people, technology and expertise to protect and support your brand promise. Our years of experience, extensive network of certified shoppers and industry-leading Internet-based platform (CEM) enable Service Intelligence to deliver integrated solutions that ensure the success of your brand performance, marketing promotions, customer service standard initiatives or any other point-of-sale program across North America.

(See advertisement on p. 5)



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Michael Dargie
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(See advertisement on p. 5)

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Service Performance Group, Inc.

808 Crossway Road, Suite B
 Holly Springs, NC 27540
 Ph. 919-567-8300
 Fax 919-567-8122
 E-mail: jerryg@spgweb.com
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 Jerry Gulyes, Principal
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Service Research Corporation

6201 S. 58th, Suite A
 Lincoln, NE 68516
 Ph. 402-434-5000
 Fax 402-434-5006
 E-mail: jvice@servicersearch.com
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 Jeremy Vice, Business Development Manager
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Service Sleuths

14L East Central Street
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 Ph. 508-520-1500
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 E-mail: info@servicesleuth.com
 www.servicesleuth.com
 Tom Mills
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ServiceProbe

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 Signal Mountain, TN 37377
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 Fax 423-517-0033
 E-mail: servprobe@msn.com
 www.pwgroup.com/sprobe/
 Ben and Ann Holt, Owners
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ServiceTRAC, LLC

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 Scottsdale, AZ 85258
 Ph. 800-951-6606
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SG Marketing Group

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 Robert Seiler, Managing Director
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 Hurst, TX 76054
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 Fax 817-280-9267
 E-mail: mail@theshadowagency.com
 www.theshadowagency.com
 Charles Tinsley, President
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Shop'n Chek Worldwide, Inc.

Worldwide Headquarters
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 Norcross, GA 30092
 Ph. 770-441-5366 or 800-669-6526
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 E-mail: sales@shopnchek.com
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Shoppers' Critique International, L.L.C.

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 Longwood, FL 32750
 Ph. 407-834-3337
 Fax 407-834-6474
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Shoppers'View

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 Grand Rapids, MI 49525
 Ph. 800-264-5677
 Fax 616-447-1236
 E-mail: steve@shoppersview.com
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 www.shoppercomments.com
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 Atlanta, GA 30342
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 Fax 770-955-5040
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 www.showintell.com
 Ric Sol, V.P. Client Services
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Sights On Service, Inc.

DBA Secret Shopper
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 Golden Valley, MN 55427
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 www.secretshopper.com
 Nancy Johnson, Office Manager
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5115 Parkcenter Ave.
 Dublin, OH 43017
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 Fax 614-766-9419
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Sinclair Service Assessments, Inc.

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 San Antonio, TX 78216
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 Fax 800-600-3851
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 H . . .Health Care
 R . . .Restaurant/Fast Food
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 Fax 703-591-6583
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 E-mail: SalZorich@aol.com
 Sally Zorich, Owner
 Locally - Data collection/Field service
 B, E, F, H, R, RT, S

Cross-Index

International Mystery Shopping

These firms conduct mystery shopping on an international basis.

Actys Etudes Audit Conseil
 ath Power Consulting Corporation
 Audits & Surveys Worldwide
 Bare Associates International, Inc.
 Bare Associates Int'l. Europe
 Barry Leeds & Associates, Inc.
 Battre Affarer/Better Business
 Beyond Hello Inc.
 Capstone Research, Inc.
 Certified Reports, Inc.
 Cetram, Inc. - The Martec Group
 Creative Images Associates, Inc.
 CV Marketing Research, Inc.
 Development II, inc.

DSG Associates, Inc.

EFG, Inc.
 ESA Market Research Ltd.
 Feedback Plus, Inc.
 Global Resource Management, Inc.
 Hilli Dunlap Enterprises, Inc.
 HR and Associates, Inc.
 The Insight Works, Inc.
 Ipsos Polska
 JKS Inc. Market Research
 Just The Facts, Inc.
 Lodge Service - React Surveys NV/SA
 MacPherson Mystery Shopping
Maritz Research
Market Trends, Inc.
 Marketing Solutions Corporation
 Meyers Research Center
 Michelson & Associates, Inc.
 Millennium-Research

National Shopping Service
 National Shopping Service Network, LLC
 NOP World Mystery Shopping
 Oy Palvelu Plus - Service Plus Ltd
 Premier Service Consulting
 Presence Mystery Shopping
 Retail Services Sweden
 Bernadette Schleis & Associates, Inc.
 Scholl Market Research, Inc.

Second To None, Inc.

Sensors Quality Management, Inc.
 Service Advantage International
Service Intelligence Inc.
Service Intelligence Inc., USA
 Service Sleuths
 The Shadow Agency, Inc.
 Shop'n Chek Worldwide, Inc.
 Shoppers' Critique International, L.L.C.
 SHOPPERS, Inc.
 SKA Division of Mediafax, Inc.
 Speedmark
 Tenox Appraisal Systems
 Thinksmart
 TNS Intersearch

National Mystery Shopping

These firms conduct mystery shopping on a national basis. See also International Mystery Shopping.

Argentina

IFOP-ASECOM Latin America

Australia

Creative & Response Research Svcs.
 (Australia)
 Hoed Mystery Shopping

Austria

Hoffmann & Forcher Marketing Research

Brazil

Confirma

Canada

Advantage Sales & Marketing Canada, Inc.
 Contemporary Research Centre - Montreal
 The Corporate Research Group Ltd.
 Customer Foresight Group, Limited
 Evaluation de service Incognito Service Check
 Innotech Market Research Ltd.
 Proforma Consulting Limited
 R.I.S. Christie - The Data Collection Company
 Sixth Line Solutions
 Telepoll Canada Inc.

Germany

Confield Research
 Kramer Marktforschung GmbH

Greece

GfK Market Analysis Ltd.

Hungary

BellResearch

Italy

Freni Ricerche Sociali e di Marketing
Pragma S.r.l.

Peru

Datum Internacional SA

Puerto Rico

The Marketing Center

Slovenia

GRAL - ITEO

Turkey

GfK Turkey

United Kingdom

Field & Research Matters Ltd.
MSB-Managing The Service Business

USA

A Closer Look
A Customer's Point of View, Inc.
A Total Resource Group
AAR/All About Research
ACE Mystery Shopping
Advisory Group, Inc.
ALCOPS™
ARC Research Corporation
Ask Arizona
At Your Service Marketing
B. Business Solutions, Inc.
Bartels Research Corp.

BestMark

The Blackstone Group
BMA - BMA Mystery Shopping
Business Evaluation Services
Business Research Group, Inc.
Car-Lene Research, Inc.
Check Mark, Inc.
Check Up Marketing
Commercial Service Systems, Inc.
Confero, Inc.
Consumer Impressions, Inc.
Consumer Pulse, Inc.
Courtesy Counts, Inc.
Craciun Research Group, Inc.
Cross Financial Group
Customer 1st
Customer Perspectives
Customer Service Experts, Inc.
Customer Service Profiles
Customerize, Inc.
Cutting Edge Research, Inc.
Data Quest, Ltd.
Defensive Business Management
Devon Hill Associates
Excel Shopping and Consulting
First Glance
J. Franke Enterprises
Friedman Marketing Services
Hindsight
ICC Decision Services
IMAGES Market Research
Infotel National Marketing
Insight Research, Inc.
Integrity Auditing Services, Inc.

IntelliShop

Ipsos North America
Jancyn Evaluation Shops

Keeping Tabs, Inc.
Ken-Rich Retail Group
Kinesis
Klein Market Test/small town market research
Rickie Kruh Research
Nancy Levine Marketing Research
The Locksley Group, Ltd.
M.A.T. On-Site Research
Market Dynamics Research Group, Inc.
Market Trends Pacific, Inc.
Market Viewpoint
Measure This!
Mosaic Retail Solutions
Mystery Guest, Inc.
Mystery Shoppers, Inc.
Mystique Shopper
National Field & Focus, Inc.
New England Interviewing, Inc.
O'Connor & Associates
On-Site Solutions
Pammer Research, Inc.
Pat Henry Market Research, Inc.
Perception Strategies, Inc.
Perceptive Market Research, Inc.
The Performance Edge
The Performance Group, Inc.
Person to Person Quality
Precision Research Inc.
Precision Research, Inc.
Professional Review & Operational Shoppers, Inc.
Promotion Network, Inc.
Provizio, Inc.
Quality Assessments Mystery Shoppers, Inc.
Quality Check
QualityWorks Associates
The Quest for Best Mystery Shoppers
Quest Marketing Group, Inc.
Quick Test/Heakin
RDAssociates, Inc.
Reality Check Mystery Shoppers
Reflections Mystery Shopping
Research Strategies, Inc.
Retail Biz Consulting
Retail Diagnostics, Inc.
J.M. Ridgway Co., Inc.
Ritter and Associates
Rocky Mountain Merchandising and Research
Sampling, Events & Promotions, Inc.
Schlesinger Associates, Inc.
The Secret Shopper Company
SelectaShopper.com
Service Alliance, Inc.
Service Check.com
Service Evaluation Concepts, Inc. (SEC)
Service Excellence Group, Inc.
Service Excellence Group, Inc.
Service Impressions
Service Industry Research Systems, Inc. (SIRS)
Service Performance Group, Inc.
Service Research Corporation
ServiceProbe
ServiceTRAC, LLC
SG Marketing Group
Shoppers' View
ShowIntell Trade Show & Conference Research
Sights On Service, Inc.
Signature, Inc.
Sinclair Service Assessments, Inc.
SPAR/Burgoyne Retail Services, Inc.
David Sparks & Associates
Speedmark Information Services
Stewart International Associates
Strategic Marketing Services
Survey Service, Inc.

Surveys Unlimited, Inc.
Sutter Performance Audit Systems, LLC
Test Track Research, Inc.
Testshopper.com
Texas Shoppers Network, Inc.
TrendSource
Video Eyes LLC
Voter Consumer Research
WAC Survey of New York
WestGroup Research

Regional Mystery Shopping

These firms conduct mystery shopping on a regional basis. They have been organized by state for your convenience. See also National & International Mystery Shopping.

Alabama

Connections, Inc.
Graham & Associates, Inc.
MVP In The Field Services
New South Research

California

Cirrus Marketing Consultants
Kiyomura-Ishimoto Associates
L.A. Research, Inc.
The Question Shop, Inc.
Reyes Research
Margaret Yarbrough & Associates, Inc.

Colorado

ingather research-denver
IRI Information Research Inc.

Connecticut

iFirm Facts Interviewing

Florida

A.I.M. Field Service
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Kirk Research Services, Inc.
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Ann Michaels and Associates Ltd.
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Indiana Research Service, Inc.
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Iowa

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Kentucky

Market Research Services
Personal Opinion, Inc.

Louisiana

Focus Research, Inc.
Gulf View Research, LLC
New Orleans Field Services Associates

Maryland

Bay Area Research

Massachusetts

Focus on Service, LLC
PatronEdge

Michigan

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Barnes Research, Inc.
Crimmins & Forman Market Research
imyst, inc.

Mississippi

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Missouri

Horizon Research Services

Nebraska

The MSR Group

Nevada

Performance Insights
QSI Specialists
Williams - Jamal, Ltd

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Granite State Marketing Research, Inc.

New Jersey

Frances Bauman Associates
Opinion Polling Service®
Suburban Associates

New York

Karlamar Associates, Inc.
Q M S

North Carolina

CB&A Research, Inc.

North Dakota

Quinn Marketing and Communications

Ohio

Market Tasks, Inc.
Opinions, Ltd.

Oklahoma

Higbee & Associates, Inc.

Rhode Island

Capture, Inc.

South Carolina

Low Country Marketing, Inc.

Tennessee

People Plus
South East Market Research

Texas

Galloway Research Services
Hispanic Focus Unlimited
Market Research & Analysis of Dallas
Pfeifer Market Research, Inc.

Virginia

Metro Research Services, Inc.

West Virginia

McMillion Research Service

Wisconsin

Field Surveys & Audits, Inc.
InGold Marketing Assistance Group, Ltd.

Local Mystery Shopping

These firms conduct mystery shopping on a local basis. They have been organized by metropolitan area for your convenience. See also Regional, National & International Mystery Shopping.

Albuquerque, NM

Sandia Market Research

Atlanta, GA

Rast Marketing Research

Bangor, ME

Rapid Research

Baton Rouge, LA

The Field Force, Inc.

Boston, MA

Performance Plus

Chicago, IL

Field Research, Inc.
Galli Research Services

Cincinnati, OH

Assistance In Marketing, Inc.

Denver, CO

Strategic Insights, Inc.

Des Moines, IA

Essman/Research

Honolulu, HI

Ward Research, Inc.

Indianapolis, IN

Herron Associates, Inc.

Lubbock, TX

United Marketing Research

Memphis, TN

PWI Research

Milwaukee, WI

Lein/Spiegelhoff, Inc.

Minneapolis/St. Paul, MN

Jeanne Drew Surveys
Henceforth, Inc.
Sally E. Zorich & Associates

**Newport News/Norfolk/
Virginia Beach, VA**

Marketrends, Inc.

Orlando, FL

Product Insights, Inc.

Philadelphia, PA

Liberty Research Services, LLC

Portland, ME

Serunian Investigations & Mystery Shopping

Sacramento, CA

Opinions of Sacramento

San Antonio, TX

Service Critique

St. Louis, MO

Marketing Horizons, Inc.

San Diego, CA

Taylor Research, Inc.

Stamford, CT

LPM Market Research Services

Vancouver, BC

Campbell, Edgar Inc.

Washington, DC

OMR (Olchak Market Research)

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Affordable Samples, Inc.38 Ph. 800-784-8016 sales@affordablesamples.com	I/H/R Research Group49 Ph. 800-254-0076 www.ihr-research.com
The Analytical Group, Inc.21 Ph. 800-946-2767 www.acsinfo.com	InsightExpress, LLC37 Ph. 877-329-1552 www.insightexpress.com/proven
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Microtab - *data editing and cleaning workhorse gets an update*

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January

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February

Stranded in the soup aisle (a look at research that tracks grocery store shopping patterns)

March

Industry groups vigilant on privacy

May

A timely pep talk (an interview with Synovate President Adrian Chedore)

July/August

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October

Notes from Los Angeles (a report on the annual AMA marketing research conference)

November

Two new books on mind-mining; plus a look at Boomers (reviews of the books *How Customers Think*, *Moderating to the Max*, and *After Fifty - How the Baby Boom Will Redefine the Mature Market*)

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Qualified candidates should email resumes and salary requirements to yaron.brenman@confirmit.com.

Professional Services Consultant

The Professional Services (ProS) department has a key role in: enabling Confirmit customers to get started, to rapidly acquire the necessary skills to exploit the system's features, and to constantly assist customers in becoming more proficient.

The ProS position offers exciting challenges allowing for personal development in an international environment.

Please have consulting, training or support experience, plus knowledge of J-Scripting and/or HTML. Online MR experience is a plus. The successful consultant is an efficient multi-tasker.

Trade Talk

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During another session, Shari Tallarico, an ethnographer at Microsoft, explained the ways she challenges people in Microsoft's mobile device product group to pay attention to how much useful information can be gleaned from being observant during a shopping trip. For

example, she organizes small groups for ethnographic excursions to places such as the Pike Place Market in Seattle to observe how people hold and interact with their mobile phones and PDAs. During debriefing sessions the participants recount what they saw and determine how it might be useful to Microsoft product developers.

Tallarico says ethnography isn't a cure-all, nor is it a replacement for other kinds of research. Some internal clients have had questions about the methodological rigor of ethnographic sessions, but once they've had an ethnographic experience that they felt brought them close to a customer's experience, the questions of rigor have tended to fall away. | Q



A look at our new look; going ethno in San Fran

Let's try this again. If things had gone according to plan last issue, you could have turned to this space to read all about our new look. But the folks at the printing company had other ideas. They substituted page 82 containing my column with page D82 from our focus group facilities directory. (They have assured me they weren't trying to make a not-so-subtle comment on my writing.)

I guess we just have to be thankful that page 82 didn't end up in D82's place in the directory!

So what do you think? Do you like the new look? We're all very excited about it, naturally. While we have been contemplating a change for quite a while now, the main impetus came from comments obtained through research with our readers. A number of kind people said they like the magazine just the way it is, but a greater number suggested it was time for an update.

We hope the new design is easier to navigate. Readers have said they hate being forced to flip to the back of the magazine to read the continuation of a story. From now on, while there may be a few instances where production factors force us to jump a story, we'll make every effort to avoid those annoying "continued on" lines.

Many readers also said they enjoy the magazine but don't have enough time to read everything in it. While we can't increase the number of hours in a day, we have tried to use visual

cues to make it easier to see the topic of an article, such as the heading that runs along the left edge of each story's first page, so that when you do have the time to read, you can easily find articles on topics that interest you.

Content-wise, we haven't made any major changes. We added the quant-related *By the Numbers* column a few issues back to complement the popular *Qualitatively Speaking* column. But some new features are in the works and should debut in the early part of 2004. So keep an eye out!

Change, as they say, is an iterative thing. Over the next few issues we'll no doubt make some tweaks here and there. Your feedback is a critical part of that process. As always, you can reach me at 952-854-5101 or at joe@quirks.com.

Another thing you may have noticed about the December issue was the near ubiquitous presence of ethnographic research. I didn't actually count, but I think almost every article had some reference to conducting ethnographic research — a purely accidental situation but one that nevertheless indicates ethnography's growing profile among researchers.

We're not alone in our ethnomania. An entire day was devoted to the topic at the Institute for International Research's annual market research event in San Francisco in October.

I was a little bit worried when

Robbie Blinkoff, principal anthropologist at Context Research and chairperson of the ethnography symposium, started the day off by asking all of the attendees to close their eyes and take a mental journey with him to visit a jungle tribe. Just the kind of thing a skeptical researcher would scoff at, I thought. But the audience loved it and the 10-minute relaxation exercise was a perfect way to begin what ended up being a busy and action-packed morning and afternoon.

One highlight was hearing Tammi Taylor, senior researcher, consumer insights, at Levi Strauss, talk about how the company used ethnography to investigate markets for its Levi Strauss Signature clothing line. The line is aimed at shoppers of mass market stores like Wal-Mart and Target, a market with which the company's designers weren't familiar. Well, as a result of the ethnography, the designers are now on a first-name basis with at least one of the shoppers, a woman who, through the magic of videotape, has come to personify the product line's target demographic for the company.

Taylor said the research, which included shopping trips, in-home visits, workbooks and phone surveys, also helped the company describe key concepts and ideas in the customers' language. And the videotaped portions were a good way to communicate with the designers, who are so used to dealing with things in visual terms.

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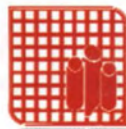
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