



QUIRK'S

Marketing Research Review

JULY/AUGUST 2004

Online research issue

- > Software review: CAWI and CATI
- > How to catch a cheat
- > Best practices for e-mailing survey invitations
- > Online ethnography





Good things do come in 3's.

410-583-9991

www.baltimoreresearch.com

cutting-edge.



Times change. Markets evolve. Fads come and go. To keep your marketers abreast of it all, count on the state-of-the-art research capabilities of *fieldwork*. Our national family of focus group facilities puts the most advanced tools and techniques at your service — including TI lines, wireless capabilities, DVD recording, usability labs, online surveys, website bid requests, e-mail recruiting, video streaming/conferencing and more. All provided with *fieldwork's* matchless attention to detail. And did we mention catering you'll go hog-wild over? Call any of our facilities and learn why: *If it takes cutting-edge research...*



It takes
fieldwork

www.fieldwork.com

atlanta: 770.988.0330
boston-waltham: 781.899.3660
chicago lab-downtown: 312.565.1866
chicago-north: 847.583.2911

chicago-o'hare: 773.714.8700
chicago-schaumburg: 847.413.9040
dallas: 972.866.5800
denver: 303.825.7788

east-fort lee, nj: 201.585.8200
minneapolis: 952.837.8300
new york-westchester: 914.347.2145
los angeles: 949.252.8180

phoenix-scottsdale: 480.443.8883
phoenix-south mountain: 602.438.2800
seattle: 425.822.8900
multi-location projects: 1.800.TO.FIELD

contents

case history

- 38 The theme is fun**
Online surveys help Paramount Parks keep respondents and visitors happy
By Joseph Rydholm

techniques

- 46 How to catch a cheat**
Techniques for identifying problem respondents in online surveys
By Bill MacElroy
- 52 Crossing a treacherous landscape**
Best practices for e-mail surveys and mailing lists
By Ann Ray
- 62 Organize to maximize**
Reporting Web site usability results
By Mike Elledge and Nancy Levy
- 68 What's my motivation?**
Panelists talk about their online survey experiences
By Christopher De Angelis
- 72 Community involvement**
Using online ethnography to explore the digital camera market
By Steve August

- 78 Hybrid vehicle**
Insurance company combines methods for Web site usability research
By Nancy Bristow and Kenneth Yang
- 84 Keep up the pace**
The case for real-time research
By Linda Stegeman

columns

- 16 Qualitatively Speaking**
Bringing clients and consumers together
By Linda Binder
- 20 By the Numbers**
Practices you can trust
By Lee Smith
- 24 Data Use**
A short history of conjoint analysis
By Bryan Orme
- 32 Software Review**
CAWI and CATI
By Tim Macer
- 110 Trade Talk**
Reading the tea leaves in Boston
By Joseph Rydholm

departments

- 8 Survey Monitor**
- 10 Names of Note**
- 12 Product and Service Update**
- 14 Research Industry News**
- 101 Moderator MarketPlace™**
- 107 Index of Advertisers**
- 108 Classified Ads**
- 109 Correction**



Illustration by Jennifer Coppersmith

Publisher Emeritus
Tom Quirk

Associate Publisher
Evan Tweed

Editor
Joseph Rydholm

Production Manager
James Quirk

Directory Manager
Steve Quirk

Directory Assistant
Shawn Hardie

Marketing Manager
Dan Quirk

Advertising Sales
Evan Tweed
952-854-5101

Lane E. Weiss
415-461-1404

your customers talk to us worldwide

Australasia

Africa

Asia

Europe

America

Internet: www.probert.com

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

- full service
- international staff
- country fieldwork supervised locally by PRP managers
- 130 CATI work-stations
- interviews in customers' native languages
- certified ISO 9001 International
- multilingual field forces in 28 airports worldwide



Moving cameras,
broadcast quality equipment,
and unmatched experience...

With FocusVision
the difference is perfectly clear.



FocusVision is the world leader in the live transmission of qualitative research from a global network of over 250 top-rated, independent focus facilities. The same facilities you probably use now.

Each facility is equipped with our state-of-the-art technology and broadcast quality moving cameras to provide transmissions so clear and reliable you'd swear you were there.

Whether it is FocusVision VideoConferencing or VideoStreaming (or both) your projects will benefit from the increased participation that real-time, remote viewing makes possible while saving time and reducing the costs and hassles associated with travel.

*Only FocusVision has
live camera operators,
dedicated equipment, a
24 hour technical support
center and over 14
years experience to deliver
the highest quality,
most reliable viewing
experience you can get.*

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

Call 1-800-433-8128

e-mail: info@focusvision.com

Learn more: www.focusvision.com

FocusVision™ Member Facilities

The largest network of top-rated facilities now equipped for videoconferencing and videostreaming service.

ARIZONA Phoenix Delve-Phoenix Fieldwork Phoenix, Inc.-South Mountain Plaza Research-Phoenix Scottsdale Fieldwork Phoenix, Inc.-Scottsdale Focus Market Research, Inc.-GroupNet™	Orlando AccuData Market Research, Inc.-GroupNet™ Schlesinger Associates Tampa The Herron Group-GroupNet™ Plaza Research Superior Research TAI-Tampa Bay Inc.	Focus on Boston-Braintree Focus on Boston-Waltham National Field and Focus-Natick	PENNSYLVANIA Philadelphia-Downtown Focus Pointe JRA Research, Inc. Schlesinger Associates Philadelphia (suburban) Delve Focus Pointe-Bala Cynwyd Focus Suites of Philadelphia Group Dynamics in Focus, Inc.-GroupNet™ Bala Cynwyd Pittsburgh Focus Center of Pittsburgh
CALIFORNIA (Northern) San Francisco CRA/Focus Pointe Ecker & Associates Downtown & South San Francisco Fleischman Field Research, Inc. Nichols Research, Inc.-GroupNet™ Plaza Research San Francisco (suburban) Nichols Research, Inc.-GroupNet™ San Jose Nichols Research, Inc.-GroupNet™	GEORGIA Atlanta Delve Fieldwork Atlanta, Inc. Jackson Associates, Inc.-GroupNet™ John Stolzberg Market Research Murray Hill Center Plaza Research Schlesinger Associates Superior Research	MINNESOTA Minneapolis Delve Fieldwork Minneapolis, Inc. Focus Market Research, Inc.-GroupNet™ Orman Guidance Research	RHODE ISLAND Providence Boston Field & Focus Performance Plus-GroupNet™
CALIFORNIA (Southern) Los Angeles Adept Consumer Testing, Inc.-GroupNet™ Beverly Hills Adept Consumer Testing, Inc.-GroupNet™ Encino Adler Weiner Research Westwood Assistance in Marketing Atkins Research Group, Inc. Delve Focus Pointe L.A. Focus Mecza Marketing Research Murray Hill Center West-Santa Monica Plaza Research Savitz Field & Focus Schlesinger Associates Trotta Associates Marina Del Rey L.A. Orange County Fieldwork L.A., Inc. Trotta Associates-Irvine San Diego Luth Research, Inc. Plaza Research Taylor Research, Inc.-GroupNet™	ILLINOIS Chicago-Downtown Adler Weiner Research Chicago Focus Fieldwork Chicago-Lab Focus Pointe Focuscope, Inc. Illinois Center Market Research Murray Hill Center National Data Research, Inc.-GroupNet™ National Qualitative Centers Plaza Research Savitz Field and Focus Schlesinger Associates Smith Research, Inc. Chicago-Suburban Adler Weiner Research Assistance in Marketing Delve-Oak Brook Fieldwork Chicago Inc.-North Fieldwork Chicago, Inc.-O'Hare Fieldwork Chicago, Inc.-Schaumburg Focuscope, Inc.-Oak Park National Data Research, Inc.-GroupNet™ Northfield Oakbrook Interviewing Center O'Hare In Focus-Des Plaines Smith Research, Inc.-Deerfield	MISSOURI Kansas City Delve St. Louis Delve Peters Marketing Research, Inc.	TENNESSEE Memphis Accudata Market Research, Inc.-GroupNet™
COLORADO Denver Accudata Market Research, Inc.-GroupNet™ Colorado Market Research Fieldwork Denver, Inc. Information Research Ingather Research Plaza Research	INDIANA Indianapolis Herron Associates, Inc.-GroupNet™	NEVADA Las Vegas Las Vegas Field and Focus	TEXAS Austin Tammadge Market Research, Inc. Dallas CRA/Focus Pointe Dallas Delve Fieldwork Dallas, Inc. Focus on Dallas, Inc.-GroupNet™ Murray Hill Center Plaza Research Dallas Savitz Field and Focus Schlesinger Associates Houston CQS Research, Inc. Medical Marketing Research Opinions Unlimited, Inc.-GroupNet™ Plaza Research Savitz Field and Focus
CONNECTICUT Danbury MarketView Norwalk New England Marketing Research Stamford Focus First America The Focus Room	KANSAS Kansas City The Field House	NEW JERSEY Fieldwork East, Inc.-Fort Lee Focus Pointe North Jersey-Teaneck JRA Associates-Mt. Laurel Meadowlands Consumer Center, Inc.- GroupNet™ Secaucus Peters Marketing Research, Inc. Plaza Research (Marlton) Plaza Research (Paramus) Schlesinger Associates Edison TAI New Jersey-Teaneck	VIRGINIA Alexandria Martin Focus Group Centers Fairfax Metro Research Services, Inc.
FLORIDA Fort Lauderdale Plaza Research WAC of South Florida, Inc. Jacksonville Irwin Research Services Miami Miami Market Research, Inc. National Opinion Research Services Rife Market Research, Inc.	MARYLAND Baltimore Baltimore Research House Market Research	NEW YORK New York City Focus Plus Inc. Focus Pointe Focus Suites of New York Murray Hill Center New York Focus Schlesinger Associates The Focus Room WAC of New York, Inc. New York (suburban) Access Metro NY-New Rochelle Fieldwork NY, Inc.-Westchester JRA Research-White Plains The Focus Room-White Plains	WASHINGTON Seattle Consumer Opinion Services, Inc.-GroupNet™ Delve Fieldwork Seattle, Inc. Gilmore Research Group
	MASSACHUSETTS Boston-Downtown Bennett Research-2 locations Boston Field & Focus Performance Plus- GroupNet™ Copely Focus Centers Focus on Boston Focus Pointe Boston Schlesinger Associates Boston-Suburban Boston Field & Focus Performance Plus-GroupNet™ Framingham Fieldwork Boston, Inc.	NORTH CAROLINA Charlotte Leibowitz Market Research Assoc., Inc.-GroupNet™ Raleigh L & E Research	WASHINGTON DC Washington DC House Market Research Shugoll Research, Inc.-GroupNet™
		OHIO Cincinnati Market Inquiry MarketVision Research QFact Marketing Research, LLC-GroupNet™ Wirthlin Worldwide Cleveland Focus Groups of Cleveland Survey Center Pat Henry Cleveland Columbus Delve	WISCONSIN Appleton Delve Milwaukee Lein/Spiegelhoff, Inc.
		OREGON Portland Consumer Opinion Services, Inc.-GroupNet™	CANADA Toronto Toronto Focus

Plus Over 90 International Facilities

FocusVision Worldwide, Inc., 1266 East Main Street, Stamford, CT 06902-3562

Tel: 800-433-8128 • Fax: 203-961-0193

E-mail: info@focusvision.com • Web Site: www.focusvision.com

Ads get noticed, even as they whiz by, DVR users say

Those predicting the digital video recorder will bring about the demise of television advertising

may be surprised to learn that DVRs actually have the opposite effect.

According to a new report, *Demystifying Digital Video Recorders*, from Stamford, Conn., online market research firm

InsightExpress

and advertising publisher

MediaPost, the opportunities for reaching their target audiences are actually enhanced as DVR users watch more hours of television



Further benefiting advertisers, 54 percent all DVR users have

rewound or paused television commercials to understand the advertised product. Revealing opportunities to expand the current advertising model, more than a third (37 percent) of DVR users would welcome the opportunity to request information via their DVR when viewing commercials of interest.

Respondents for these studies were randomly recruited online using InsightExpress' e-RDD methodology. Each survey was cre-

ated, distributed and tabulated during the first quarter of 2004. For more information visit www.insightexpress.com or call 203-359-4174.

ated, distributed and tabulated during the first quarter of 2004. For more information visit www.insightexpress.com or call 203-359-4174.

ated, distributed and tabulated during the first quarter of 2004. For more information visit www.insightexpress.com or call 203-359-4174.

ated, distributed and tabulated during the first quarter of 2004. For more information visit www.insightexpress.com or call 203-359-4174.

ated, distributed and tabulated during the first quarter of 2004. For more information visit www.insightexpress.com or call 203-359-4174.

ated, distributed and tabulated during the first quarter of 2004. For more information visit www.insightexpress.com or call 203-359-4174.

ated, distributed and tabulated during the first quarter of 2004. For more information visit www.insightexpress.com or call 203-359-4174.

ated, distributed and tabulated during the first quarter of 2004. For more information visit www.insightexpress.com or call 203-359-4174.

ated, distributed and tabulated during the first quarter of 2004. For more information visit www.insightexpress.com or call 203-359-4174.

each week and recall commercials - even when fast-forwarding.

The report, based on multiple online consumer surveys, reveals that consumers use DVRs to enhance their television viewing experience and adjust television viewing to accommodate their busy schedules. A surprise to many advertisers, DVRs result in additional television viewing, higher satisfaction with television, and virtually eliminates the 49 percent of all consumers who leave the room or channel surf when commercials air.

ated, distributed and tabulated during the first quarter of 2004. For more information visit www.insightexpress.com or call 203-359-4174.

Teens talk about food

Some snapshots from New York-based BuzzBack Market Research's recently published *Teen Health & Nutrition* study:

- Teen eating behavior (full meals): Teen boys eat more full meals (2.3) per day vs. teen girls (2.0).
- Teen snacking behavior: Teen

boys snack more times per day (3.3) vs. teen girls (3.1).

• Top five snacks: 1) potato/tortilla chips (63 percent), 2) cookies (55 percent), 3) chewing gum (47 percent), 4) fresh fruit (47 percent), 5) ice cream (47 percent).

• Top five snack brands (write-ins): 1) Oreo (22 percent), 2) Ritz (21 percent), 3) Doritos (20 percent), 4) Coca-Cola (19 percent), 5) Snickers (18 percent).

• Favorite fast-food restaurant: 64 percent of teens say Subway is their favorite fast-food restaurant; McDonald's takes second place (48 percent).

• Criteria for what to eat: fresh (74 percent), easy/fast to prepare (71 percent), "on the go" food (61 percent), extra energy food (58 percent), vitamin-source food (56 percent).

• Eating is sixth-most popular weekly activity. Top three: 1) sleeping (37.6 hours), 2) surfing the Internet/writing e-mails (14.3 hours), 3) hanging out with family (11.6 hours) . . . and 6) eating (9.0 hours).

• Teen girls try more new food products: females (60 percent), males (51 percent).

• Motivators for trying new food products: curious about it (71 percent); offered a new flavor (67 percent), looked appetizing (63 percent), convenient to prepare/eat (54 percent).

Over 500 U.S. teens were surveyed. For more information visit www.buzzback.com.

Toyota and Chevrolet lead among Hispanic-Americans

In the race to capture the increasingly influential Hispanic-American consumer, Ford, Toyota and Chevrolet have distanced themselves from other automotive

continued on page 90

Metric	Impact
Additional Weekly Viewing Hours (19.2 to 23.9)	+ 24%
Increased Television Viewing Satisfaction (27 percent to 37 percent)	+37%
Loss of Ad Exposure From Fast-Forwarding	-7%
Recapture of 49 percent of Consumers Who Successfully Zap Commercials	+96%



FOCUS ON YOUR MARKET


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

CENTRAL LOCATION INTERVIEWING
INTERCEPT INTERVIEWING
PRODUCT AND TASTE TESTS

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



Video powered by
Interclipper



Schlesinger Associates
A Marketing Research Corporation

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

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

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

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

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

BOSTON
PHONE 617-542-5500
FAX 617-542-5590

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

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

DALLAS
PHONE 972-503-3100
FAX 972-503-3102

CALL US TOLL FREE AT 866-549-3500
www.SchlesingerAssociates.com

names of note

Following the retirement of **Derek Martin** after almost 35 years as co-founder and chairman of U.K.-based *Martin Hamblin GfK*, the Martin Hamblin GfK board has named **Kjell de Orr** as his successor. De Orr will maintain his previous role as global head of strategic key accounts and business development.

Seattle-based *Starbucks Coffee Company* has promoted **Anne Saunders** to senior vice president, marketing, retail North America. Saunders leads the market research team.

Marketing Systems Group, Fort Washington, Pa., has added **Kim Horace** and **Janet Malofiy** as administrative assistants and promoted **Reggie Blackman** to vice president, **Jennifer Smith** to CSR, and **Vince Connor** to phone room manager.

Arbitron Inc., New York, has named **Jay Guyther** senior vice president of Portable People Meter (PPM) marketing for the U.S. as well as internationally. **Brad Bedford** has been named vice president, international PPM marketing.

Millward Brown has announced a number of personnel changes. **Michael Walkowiak** has been named head of Millward Brown China. **Melissa Ross** has joined Millward Brown's Global Media Evaluation Unit, and will be based in the U.K. **João Marques** has been named managing director for the Iberia region (Millward Brown Spain and Millward Brown Portugal). Marques replaces **Stefano Carlin**, who has taken up a new mainland European regional role. **Petra Prusova** has been appointed development director Central and Eastern Europe while maintaining her current role as managing director of MB Czech Republic. **Anne Monnier** has been named head of client service,

Millward Brown France. **Irma Gonzalez-Clark** has joined Millward Brown North America as vice president to lead the U.S. multicultural practice. She will be based in the Naperville, Ill., office. **Cindy Whiteway** has been named vice president of Millward Brown IntelliQuest. She will be based in the Boston area.

TNS Media Intelligence/CMR, New York, has named **Thomas Rocco** executive vice president, sales and marketing.

R. L. Polk & Co., Southfield, Mich., has named **Steve Flinker** managing director of R. L. Polk Australia. He will be based in Melbourne.

Jinny Henenberg has joined the advertising and brand performance division of Horsham, Pa.-based research firm *TNS* as a senior vice president.

Catalina Marketing Research Solutions, Crestview Hills, Ky., has named **Shelly Brown** script programmer. In addition, **Andy Lewis** has joined the project services group in Crestview Hills as a project coordinator.

Tim Antoniewicz has joined *Harris Interactive Service Bureau* in Philadelphia as director, client development.

Paul Johnson has been named senior research executive and will manage the new southeastern Michigan operation of Cincinnati-based *Sigma: Research Management Group*.

Nielsen Entertainment has named **Adrienne Becker** senior vice president, development and communications. She will be based in Los Angeles.

In conjunction with the opening of its new Hispanic data collection division, *AllPoints Research Inc.*, Winston-Salem,

N.C., has named **Jason Rivera** qualitative coordinator and research assis-



Rivera

Mejorado

tant, and **Jose Mejorado** data collection supervisor. Separately, the firm has



Dobrikova

named **Rositza (Rossi) Dobrikova** research analyst.

Survey Sampling International, Fairfield, Conn., has named **Steve Flanagan** vice president for global development.

Stamford, Conn., beverage firm *Diageo* has named **Norma Suter Drew** senior vice president of marketing for premium white spirits and for scotch brands managed by Schieffelin & Somerset, which were transferred to Diageo North America on July 1st.

Food Marketing Institute, Washington, D.C., has named **Debbie Gann** director of research.

Global Market Insite, Seattle, has named **Michael Gordon** managing director of sales, North America. He will be based in the firm's San Francisco office. In addition, **Greg Ward** has joined the firm as director of sales, Europe. He will be based in London.

Fast, accurate online research

Build-it-yourself Deploy-it-yourself Analyze-it-yourself

You need a solution that not only meets industry standards, but sets them.

Inquisite is designed to help market researchers leverage the power, speed and flexibility of the Internet for online research.

Inquisite combines enterprise features with the ease of use that all do-it-yourself researchers demand. Inquisite's robust toolset lets you create high-end surveys without high-end costs.

Visit research.inquisite.com or call **800.581.7354** to learn more about our incentives for market research professionals.

Do-it-yourself market research.SM

 **inquisite**[®]
web survey system

Inquisite 6.5 NOW AVAILABLE

For more details go to: www.inquisite.com

.....

Advanced survey features:

Data pre-population	Online administration
Branching	Invitation management
Data piping	Respondent authentication
Internationalization	HTML email invitations
Survey data sharing	Email opt-out lists
Response randomization	Online analysis & reporting
Multi-select validation	Multi-scale questions
Survey preview & printing	Multi-scale tables
One-click publishing	Scheduled reports
Styles and templates	Hosting services
Response editor	Survey approval process
Corporate branding	Multiple export formats
Security	Scalability

product and service update

MapInfo adds retail and food service data

MapInfo Corporation, Troy, N.Y., is now offering databases from Chain Store Guide, a source of retail and food service data. This data, combined with MapInfo's location intelligence software, is designed to provide retailers with an accurate geographic representation of a given trade area, enabling them to assess the competitive landscape and make decisions regarding target marketing and site selection.

The data includes listings and contacts for thousands of stores in the U.S., including convenience stores, chain drug stores, home centers, discount apparel and department stores, category killers, supermarkets and high-volume restaurants. For more information visit www.mapinfo.com.

Two new recruitment methods for online surveys

New York research firm Dynamic Logic has announced the availability of two new non-pop-up recruitment options, called DynamicLink and DynamicLayer, that invite Internet users to participate in research surveys. Both options are designed to offer more fluid user experiences, improve response rates and increase flexibility for online publishers and advertisers.

DynamicLink is a full-page, interstitial-like unit that uses existing assets on a Web page to lead to a survey invitation. DynamicLayer is a DHTML unit that features customizable time delays. Both techniques appear to every nth visitor of a Web page and can be co-branded. For more information visit www.dynamiclogic.com.

New services from WebSurveyor

Herndon, Va.-based WebSurveyor

Corporation has introduced a new set of services to offer assistance in all aspects of the survey lifecycle, from creating surveys to data analysis and reporting. The new offerings are broken into three main areas - consulting, review and execution - and can be purchased separately or as a complete turnkey service.

Consulting: WebSurveyor offers consultations on any aspect of the survey process, including survey creation, e-mail list rental, HTML and text e-mail invitation development, and data analysis and report creation and communication.

Review: For those who are seeking guidance on efforts already underway, WebSurveyor Services will review the survey components completed by a customer, including questions, survey instrument design, survey invitations, list sources, data analysis and reporting, and provide recommendations in a written report.

Execution: WebSurveyor will assist with execution of any aspect of the three main survey components - creation, conducting, and communication of survey results. For more information visit www.websurveyor.com.

Datapedia provides statistical projections to 2050

Bernan Press, Lanham, Md., has released the third edition of Datapedia of the United States. Now subtitled "American History in Numbers," this is the first update of Datapedia in nearly three years. Datapedia is a desk reference that continues and enhances the Census Bureau's discontinued Historical Statistics of the United States from Colonial Times. In addition to statistical coverage reaching back to 1790, this edition of Datapedia also provides statistical projections for selected data series through the year

2050, allowing users to gain an idea of where the American economy and society might be at the middle of the twenty-first century.

The third edition of Datapedia also boasts expanded coverage on a range of topics, including: health and health care; food and nutrition; education and learning; law enforcement, courts and prisons; arts, entertainment, recreation and travel; politics and elections; public finance; and national defense. Each chapter covers a different subject - from agriculture to transportation - and provides statistical tables of national-level data. Narrative highlights help users understand the significance of the historical data series and place the numbers in context. These highlights give information on data sources; explain the importance of certain sets of data; provide supplemental and state-level information; and where appropriate, are accompanied by maps and charts. For more information call 800-865-3457 or visit www.bernanpress.com.

Pulse Train updates three

U.K.-based Pulse Train has updated three of its products. Visual QSL, Pulse Train's questionnaire design package, facilitates survey design for all paper questionnaires and forms, as well as CATI, CAPI, Web and scanning surveys. Version 3.50-68 includes enhancements such as: improvements in the link between Visual QSL and Bellview Fusion available via the Tools application menu; added support for long file-names for the QSL and schema files when running any tools, simplifying the identification of questionnaires once they are loaded into the Bellview system; Bellview Scan enhancements relating to registration marks and multi-column pages; and an updated dialog for the defin-

continued on page 94

★ "This is the best facility in the country" ★ "You guys are fabulous... absolutely fabulous" ★ "You have a terrific place, great service, wonderful respondents and the best food anywhere" ★ "I travel all around the country doing groups, Baltimore Research is far superior to other facilities" ★ "You know, I did this project in three cities total... Baltimore Research was the only facility that didn't complain about the recruit. You made it happen without moans and groans and constantly asking for leniency" ★ "What an awesome experience" ★ "Thank you for your extreme attention to detail... you anticipated my every need" ★ "We love your chef" ★ "Why don't you open facilities in other cities" ★ "You're the best... without a doubt the best" ★ "Your interior space is great; warm and homelike, but professional" ★ "Thank you for the great show rate; I know what a difficult recruit this was" ★ "This is the best facility in the country" ★ "You guys are fabulous... absolutely fabulous" ★ "You have a terrific place, great service, wonderful respondents and the best food anywhere" ★ "I travel all around the country doing groups, Baltimore Research is far superior to other facilities" ★ "You know, I did this project in three cities total... Baltimore Research was the only facility that didn't complain about the recruit. You made it happen without moans and groans and constantly asking for leniency" ★ "Thank you for your extreme attention to detail... you anticipated my every need" ★ "We love your chef" ★ "Why don't you open facilities in other cities" ★ "You're the best... without a doubt the best" ★ "Your interior space is great; warm and homelike, but professional" ★ "Thank you for the great show rate; I know what a difficult recruit this was" ★ "This is the best facility in the country" ★ "You have a terrific place, great service, wonderful respondents and the best food anywhere" ★ "I travel all around the country doing groups, Baltimore Research is far superior to other facilities" ★ "You know, I did this project in three cities total... Baltimore Research was the only facility that didn't complain about the recruit. You made it happen without moans and groans and constantly asking for leniency" ★ "What an awesome experience" ★ "Thank you for your extreme attention to detail... you anticipated my every need" ★ "We love your chef" ★ "Why don't you open facilities in other cities" ★ "You're the best... without a doubt the best" ★ "Your interior space is great; warm and homelike, but professional" ★ "Thank you for the great show rate; I know what a difficult recruit this was"

**Our Client's
 verbatims speak
 for themselves**



410.583.9991

News notes

The Texas A&M Mays Business School, Center for Retailing Studies (CRS) has announced a partnership with St. Louis-based **Maritz Research** to provide stu-

dents with firsthand knowledge of the retail marketing industry. Maritz Research will be involved in many of the Center's programs including: visiting "Professor for a Day" executive lecturers, internships for qualified

CRS students, financial support for CRS and participation in new CRS projects where possible.

Reston, Va.-based research firm **WirthlinWorldwide** is sponsoring a book project in partnership with the **Advertising Research Foundation (ARF)** which will include an analysis of over 100 case studies, focused on the value market research delivers to advertising effectiveness, submitted by Fortune 100 organizations to the David Ogilvy Research Awards program, run by the ARF since 1994.

Key features of the ARF book, tentatively titled *Re: Thinking Advertising: What The David Ogilvy Awards Have Taught Us*, include an analysis and synthesis of the core characteristics of winning advertising efforts as exemplified by over 100 Ogilvy Award finalist case studies; interviews with Fortune 100 advertising and marketing executives, as well as leaders on the agency, media and research side, addressing the major issues confronting the industry. The author of the book is Raymond Pettit, senior independent consultant, WirthlinWorldwide, based in Wirthlin's New York office. The book is scheduled for publication in 2005.

New York-based **Nielsen Media Research** announced in June it would begin offering Local People Meter (LPM) data in New York on June 3rd. Nielsen will also continue to operate the current Meter/Diary system in New York for three more months, and during this time either set of data may be used commercially. Nielsen believes that it is in the best interest of its clients for both systems to be run concurrently during a transition period. Nielsen originally planned to launch the LPM service in New York on April 8th. However, the introduction was postponed for two months in response to community leaders and elected officials who raised questions about the system's

Calendar of Events July/November

The Institute for International Research will hold Shopper Insights in Action, a research-oriented retailing conference, on July 12-14 at the Westin Hotel Michigan Ave., Chicago. For more information visit www.iirusa.com/insights.

The American Marketing Association will hold its annual marketing research conference on September 19-22 at the Hyatt Regency Superdome in New Orleans. For more information visit www.marketing-power.com.

The European Society for Opinion and Marketing Research will hold its annual congress on September 19-22 in Lisbon. For more information visit www.esomar.org.

Sawtooth Software will hold its conference on the acquisition and analysis of market research data on October 6-8 in San Diego at the Shelter Pointe Hotel and Marina. In addition to the general conference, there will be optional tutorials, clinics and workshops. Attendance will be limited to 200 participants. For more information call Daneil Neibuhr at 360-681-2300 or visit www.sawtoothsoftware.com.

The Council of American Survey Research Organizations will hold its annual members-only conference on October 6-8 at the Hilton Head Marriott Beach and Golf Resort, Hilton Head, S.C. For more information visit www.casro.org.

The European Society for Opinion and Marketing Research, in conjunction with EMAC, will hold its research in marketing conference on October 10-12 in Warsaw. For more information visit www.esomar.org.

The European Society for Opinion and Marketing Research will hold its annual Latin American conference on October 24-26 in Mexico City. For more information visit www.esomar.org.

SPSS will hold its Directions 2004 user conference on October 24-27 at the Flamingo Hotel in Las Vegas. For more information visit www.spss.com/spssdirections.

The Institute for International Research will hold its annual market research event on October 26-29 at the Hotel Nikko in San Francisco. *Quirk's* readers can receive a 15 percent discount on registration fees by using the code XM1628QUIRKS and registering via phone at 888-670-8200 or via e-mail at register@iirusa.com. For more information visit www.iirusa.com/research.

The Interactive Marketing Research Organization will hold its annual event in conjunction with the IIR annual research conference on October 26-29 at the Hotel Nikko in San Francisco. For more information visit www.imro.org.

The Qualitative Research Consultants Association will hold its annual conference on October 27-30 at the Tapatio Cliffs Resort, Phoenix. For more information visit www.qrca.org.

The Marketing Research Association will hold its annual fall education conference and technology forum on November 3-5 in San Diego. For more information visit www.mra-net.org.

The European Society for Opinion and Marketing Research will hold a conference on telecommunications on November 7-9 in Brussels. For more information visit www.esomar.org.

The European Society for Opinion and Marketing Research will hold a conference on qualitative research on November 28-30 in Cannes, France. For more information visit www.esomar.org.

measurement of the viewership habits of African-American and Latino households.

Alliances/strategic partnerships

Chicago-based **Information Resources, Inc.** (IRI), has entered into an information-sharing agreement with Family Dollar Stores under which IRI will now offer account-specific point-of-sale sales tracking and analysis for Family Dollar, providing CPG manufacturers with sales information to measure product performance and competitive activity within the Family Dollar chain and other dollar-store sectors.

Millward Brown now has an office in Central America following the signing of a licensing deal with Honduran research firm Mercaplan.

Evansville, Ind.-based **The ARS Group** has announced a partnership

with **AdSAM Marketing** to combine the ARS Group's capabilities in behavioral advertising measurement related to sales with AdSAM's background in understanding the emotional response to advertising.

Seattle research firm **NetReflector, Inc.**, and **Genticity, Inc.**, a Canada-based provider of customer interaction management software, have announced a strategic partnership. Under the terms of this alliance, Genticity will integrate NetReflector's enterprise online survey technology, InstantSurvey, into Customer1, its suite of software applications and services that enable multiple contact centers to function as one.

Association/organization news

The Advertising Research Foundation

has named a host of new members to its board of directors: Laura Bright, vice president, marketing research for Allied Domecq Wines and Spirits; Neil Canter, man-

aging partner for the North American Marketing Sciences practice at Accenture; Stacey Lynn Koerner, executive vice president, director of global research, at Initiative Media; Satish Korde, president of the Ford Motor Company Group at WPP Group PLC; Jerry Lee, president and partner of WBEB 101 FM Philadelphia; Joan M. Lewis, consumer and market knowledge director, corporate function, Procter & Gamble; Jim Nyce, vice president, strategy and insights, PepsiCo Beverages & Foods; Mary Ann Packo, chief client and marketing officer, Millward Brown; Michael I. Schwartz, vice president, global consumer insights and strategy, Kraft Foods; Kate Sirkin, senior vice president and global media research director of Starcom MediaVest Group; and Greg Stuart, president and CEO of the Interactive Advertising Bureau.

continued on page 98

If everyone was the same ...you wouldn't need us.



ETC helps you explore the differences by providing full-service research, both qualitative and quantitative, in the multi-cultural marketplace. Our diverse staff of multi-lingual and multi-ethnic professionals will help you gain consumer insights that translate to actionable, real world solutions.

ETC's clients benefit from discovering the psychological motivators that drive their target audience, providing them with the insights vital to competing in the ethnic marketplace.

Let us show you how you can benefit from our knowledge and experience. Please give us a call.

Erlich Transcultural Consultants

818-623-2425

info@etcethnic.com

www.etcethnic.com



Focusing on diversity

Bringing clients and consumers together

Much has been said in the marketing press recently about the variety of ways in which companies have enhanced their qualitative experience by bringing clients directly in contact with consumers. Companies such as Quaker Oats, Procter & Gamble and Nickelodeon have been featured in marketing research seminars and articles on the topic.

This is not a revolutionary change in how qualitative is conducted. It is an evolutionary adaptation of methods. It makes sense given changes in the marketplace today. There is increasing need among clients for in-depth understanding of their consumers. Market segments are becoming even more fragmented, consumer behaviors are changing rapidly, and consumers are becoming more savvy and comfortable with marketing concepts and clients' presence. Consumers want to know they are being listened to and appreciate having the back-room demystified.

At the same time, clients are having more difficulty learning when

asked to observe through the mirror. They are increasingly expected to multitask - to keep on top of events in the office while sitting in the back room. They are expected to listen and observe while checking e-mails and being repeatedly interrupted by phone calls. As a result, instead of learning fully, they are listening halfheartedly.

Bringing clients together with consumers allows clients to focus on the issues at hand for more effective learning. It keeps them more involved and mentally stimulated. It enables them to follow up with consumers in real time - rather than having to pass notes to the moderator. It allows clients to be fully present, to truly experience the sessions with their senses rather than through filtered visual and auditory observation only.

Not a new idea

The idea of bringing clients and consumers face to face - without the anonymity of the two-way mirror - is not new. In the past, clients

Editor's note: Linda Binder is senior vice president and moderator-consultant at Primary Insights, Inc., a Lisle, Ill., research firm. She can be reached at 630-963-8700 or at linda@primaryinsights.com.

have informally interviewed consumers outside the office and been present during observational interviews. Some routinely join moderator-consultants in the focus group room to observe and ask questions. Our firm has been involving clients in the interviewing room for years, and we often introduce clients to consumers by showing respondents who is behind the mirror.

Eliminating the mirror is becoming more mainstream. Clients are encouraged to examine ways of getting closer to consumers. This might be as simple as joining the moderator for the entire focus group or IDI session. It may be as dramatic as facilitated...

...joint client-consumer ideation sessions;

...client-led subgroups of consumers within the context of a large-

ithinkinc.com

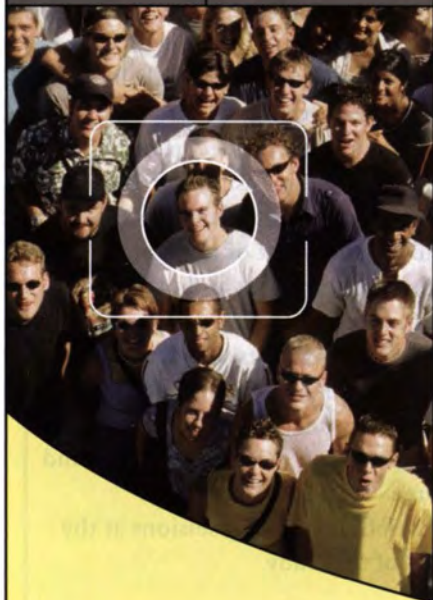
i.think_inc.



Just who really is answering your online survey?

With 7 years of online panel experience, we know our ithinkers

- > Our panel was built one person at a time — Never through webmaster referral programs, co-registrations or mass web-site intercepts
- > Respondent survey answers are validated against stored demographic information for consistency and accuracy
- > Security, privacy and double opt-in best practices are strictly enforced
- > Approximately 1.4 million US household members
- > Survey programming and hosting also available for start-to-finish fielding solutions

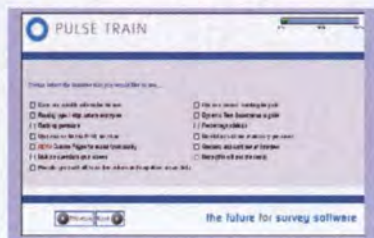


[i.think_inc.]

www.ithinkinc.com 2811 McKinney Ave., Suite 218 Dallas, TX 75204 [214] 855-3777

Innovative Web Software

Bellview Web is the complete Web survey solution. Combining survey design, data gathering, online survey management and real-time reporting, you can use it to manage even the most complex survey.



→ Quick and Easy Survey Design

Fast, efficient set-up using a Windows interface

Preview questionnaires on screen

Text translator for multi-lingual surveys

Survey deployment at the touch of a button

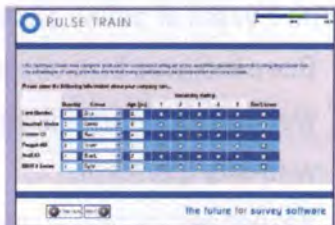
→ Powerful and Flexible Data Collection

Field any Web survey - market research, evaluation studies, panel research and customer satisfaction

All question types: single, multiple, character, quantity, open-end, grids, skip logic, text substitution, pictures, sound and video

Sample and quota management

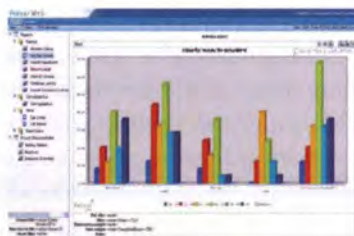
Customizable user interface



→ Real-Time Survey Management

Up-to-the-minute progress reports viewed any time from any place using a browser

Statistics for number of completes, average time spent on each question, quota fulfilment and sample status



→ Real-Time Reporting of Results

Up-to-the-minute reports as the data is collected

Use a Web browser from anywhere

Create unlimited tables and charts

Powerful and easy to use

Install and manage Pulse Train's innovative software on your own Web servers or use our servers and Web access at MrSurvey.com.



PULSE TRAIN
the future for survey software

631 U.S. Hwy. One
Suite 406

N. Palm Beach, FL 33408

Phone: 561-842-4000

Fax: 561-842-7280

Web: www.pttssystem.com

Email: sales@pttssystem.com

er qualitative session; or

...day-long or weekend-long sessions in which clients and consumers work together.

There are several aspects to consider when deciding if, when and how to bring clients and consumers face-to-face.

- Study purpose. If client team members have a strong vested interest in a specific outcome, it might be best to keep clients in the back-room. If the study's purpose is one of exploration and/or ideation, there may be benefits to bringing parties together.

- Personalities involved. Clients who meet with consumers must be open, non-judgmental and non-leading in their language and non-verbal cues. They must be completely involved when with consumers - and be neither intimidated nor intimidating.

- Topics involved. Some clients are uncomfortable meeting consumers face-to-face if the topic is personal in nature. However, we would encourage you to challenge your assumptions.

- Commitment. Becoming involved with consumers takes time. It requires training up front, full commitment of mind and body during the sessions and extensive debriefing to allow everyone to share their insights. It is not uncommon for joint client-consumer sessions to require three-hour training meetings up front and three- to four-hour debriefing/working sessions at the end of the study.

Enhance learning

Dealing with consumers face to face can be a rewarding, unforgettable experience - and a wonderful way to enhance learning and qualitative insights. Under the guidance of a skilled researcher and facilitator - and with the appropriate study objectives - it brings clients a depth of learning that is unattainable from back room observation alone. | Q



*When you're looking for a path to reliable research services –
find a partner who knows the road.*

If it can be measured, tested, and tabulated, chances are JRA has already been there. With innovative technologies and comprehensive facilities, JRA has the expertise needed for executing the most challenging projects throughout the United States and the world. JRA is the data collection partner you need to lead you on the path to reliable results and, ultimately, success.



Global Healthcare Research Services

J. RECKNER ASSOCIATES, INC. WORLDWIDE HEADQUARTERS
587 BETHLEHEM PIKE • SUITE 800 • MONTGOMERYVILLE, PA 18936-9742

215/822/6220

info@RECKNER.COM

www.RECKNER.COM

Practices you can trust

Historically, researchers and marketers have addressed issues of market segmentation, brand strength, packaging and pricing, and competitive positioning independently. However, as markets become increasingly competitive, the impact of making a single incorrect decision among the linked set of thousands of choices to launch or reposition a product is often catastrophic.

Conjoint analysis provides researchers with the ability to measure the impact of individual product features and attributes without requiring consumers to evaluate each separately. Through a simple rating, ranking or selection by consumers, conjoint analysis captures the essence of a product as experienced in the real world. Importantly, conjoint analysis decomposes the product, service or offer into its component parts, enabling researchers to: quantify the importance and value of each element; recombine elements to create products of interest to target audiences; and accurately predict share among a competitive set.

Going mainstream due to the ability to develop sophisticated online surveys,

conjoint analysis has become an important research tool because, as reality dictates, consumers purchase products – not individual features such as the color red or brand ABC. Using conjoint analysis, practitioners can present products, services or offers with thousands of potential combinations to respondents in a user-friendly manner. While attribute batteries and other traditional techniques were used in the past to understand basic consumer needs, these approaches are comparatively limited in scale and do not enable the researcher to effectively balance elements consumers find desirable (i.e., specific functionality, etc.) with those they do not (i.e., higher prices, etc.).

While marketers in the advertising and consumer products sectors have been conducting conjoint research for years, additional industries are embracing this technique. For instance, many financial service firms are using conjoint solutions to craft the “perfect” credit card solicitation by customer segment, balancing, for example, cash-back or frequent-flier mile reward systems with higher annual fees or interest rates.

Editor's note: Lee Smith is president and chief operating officer of InsightExpress, a Stamford, Conn., research firm. He can be reached at lsmith@insightexpress.com or at 203-406-3201.

Developing an online conjoint survey is not difficult, but it does require planning. At the heart of any conjoint analysis is the design, which is most commonly presented as a matrix of attributes and levels. The attributes represent the dimensions of the product, service or offer. Consider a cell phone manufacturer seeking to introduce a new product composed of a monthly fee, included minutes, scope of coverage, applicable roaming fees, whether or not the phone has Internet access, and brand of the company providing the service; these are the attributes of the design, of which there are six in this example (Table 1).

When establishing the design, it is important that the attributes be independent to the greatest extent possible. That is, removing one attribute from the design does not impact how the respondent will likely evaluate the levels

INSTANT TRANSCRIPTS

Want Instant Satisfaction?

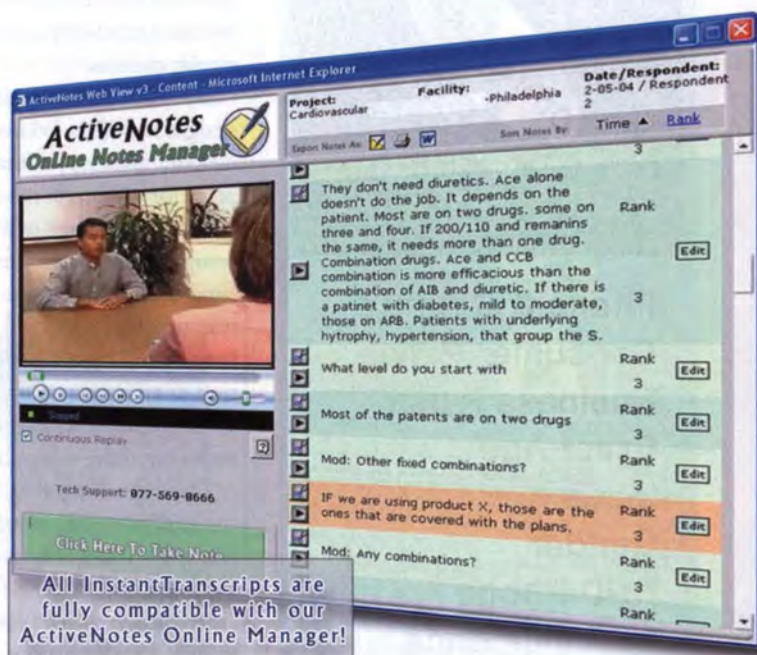
InstantTranscripts are real-time, textual transcripts that link directly to the video of your groups or interviews.

Here's how it works:

- 1) View your Focus Groups and In-Depth Interviews over the Internet using ActiveGroup. Be sure to ask for InstantTranscripts.
- 2) A transcriptionist will take real-time transcripts of your research while you watch your event live.
- 3) 30 minutes after the group or interview ends, a transcript is available!

Now you can...

- *Click on any text in the transcript and the video of that moment plays!
- *Create video clips of any transcript items you like!
- *Save the transcript file as a Microsoft Word document with links to the video!
- *Cut days, even WEEKS, off your research cycle!



Introducing Another Industry First From the Premier
Provider Of Video Streaming For Qualitative Research

3725 DaVinci Court
Norcross GA 30092

800.793.3126
www.activegroup.net



More, For Lots Less

THE
OTHER,
SAMPLING
COMPANY IN
CONNECTICUT

Online Panels
Sample Only

since
1991

- Phone & Online
- Consumer Panel
- Business Panel
- Exact Age
- Income
- Gender
- RDD Phone
- Low Incidence
- Children/Babies
- Ethnic
- Specialty Files
- Ailments
- Many More

Multi-Sourced, More Options
More Responsive
Dependable, Realistic
The Better Alternative

**AFFORDABLE
SAMPLES, INC.**

Old Greenwich, CT

sales@affordablesamples.com
www.affordablesamples.com
800-784-8016

Table 1: Example Cell Phone Design

Attributes (6)						
	Monthly Fee (4)	Included Minutes (5)	Coverage (3)	Roaming Fee (3)	Internet Access (2)	Carrier (Brand) (5)
Levels	\$19.99	None	Local	\$.10/Minute	Excluded	AT&T
	\$59.99	100	Regional	\$.25/Minute	Included	Cingular
	\$99.99	500	National	None		Sprint
	\$149.99	2000				T-Mobile
		Unlimited				Verizon

of other attributes. To further develop the design, features that are typically represented as checkboxes in traditional research should be defined as an attribute with two levels - either yes/no, included/excluded, or other similar choices.

By necessity, nearly all conjoint designs include a Price or Fee attribute enabling the respondent to trade-off price for various combinations of features. The presence of a Price attribute is suggested if elasticities are to be calculated or should revenue/profit optimization be conducted. To measure a brand's impact upon the purchase decision or to conduct competitive what-if scenarios, a Brand attribute should be included in the design as well.

Once the researcher has identified the attributes, they need to turn their attention to defining the levels. There are two or more levels for each attribute. Levels represent the potential values or enumerations for an attribute. In the above example, the Coverage attribute has three levels - local, regional and national. While levels for any given attribute may overlap, they must be in the same category.

A common challenge in developing a conjoint design is managing its size and complexity. A large design results in many potential products, increasing the number of offerings, or "cards," a respondent must evaluate. While the above example represents $4 \times 5 \times 3 \times 3 \times 2 \times 5 = 1,800$ unique cell phone offerings, conjoint analysis software reduces the number of cards a respondent must evaluate to a manageable level. To determine the minimum number of cards a design requires, subtract the number of attributes in the

design from the sum of all levels and then add one. The above example requires a minimum of $(4+5+3+3+2+5)-6+1=17$ cards. (Note: It may often be desirable to employ more than the minimum number of cards to heighten the robustness of the design. The use of an Ideal-Point or Vector attribute may further reduce the number of required cards.) To minimize respondent fatigue and drive research quality, it is often recommended that a survey not contain more than 25 products or cards.

When developing the design, a researcher should keep an eye toward the challenges the conjoint model will be used to address. As such, it may be desirable to exclude or replace one or more of the cards generated by the conjoint analysis software. This should only occur when a card representing a completely unviable offering is generated. Despite the temptation to eliminate all marginally marketable products, be aware it can be advantageous to have both highly desirable and undesirable offerings for survey participants to evaluate. Retaining these products tends to maintain the distributions of levels while increasing the quality of the conjoint design, accuracy of importance and utility calculations, and robustness of simulations.

Additionally, most conjoint analysis solutions provide the ability to select the "type" of attribute - either Part-Worth, Ideal Point, or Vector - as indicated in Table 2.

Defining a continuous attribute as an Ideal Point or Vector provides substantially greater flexibility when conducting what-if simulations - enabling levels not originally included in the design to

Table 2: Types of Attributes

Attribute Type	Application
Part-Worth	Non-continuous or qualitative attributes (brand, color, etc.)—but typically the default type for most conjoint analysis solutions
Ideal Point	Continuous, numeric attributes with unknown or non-linear levels (price, etc.)
Vector	Continuous, numeric attributes with known linear relationships (size, etc.)

be used in subsequent simulations. For example, if Monthly Fee was defined as Part-Worth, the researcher would be restricted to simulations employing only the four levels specified in the design. However, if Monthly Fee was defined as either Ideal Point or Vector, any value between \$19.99 and \$149.99 could be entered into the simulation – enabling additional business opportunities to be evaluated without the need to re-field the survey or collect additional data.

above have been developed over years of conducting conjoint studies across many industries. We will discuss interpretation of results in a subsequent article.

In summary, conjoint analysis – enabled by the Internet – is a powerful tool enabling researchers and marketers to better understand traditionally hard-to-measure consumer opinions without the need to inquire upon each facet of a product, service or offer.

Conjoint analysis is an excellent solu-

Figure 1: An Example Simulator

Product Simulator			
Attribute	Product 1	Product 2	Product 3
Monthly Fee	59.99	19.99	99.99
Included Minutes	1000	500	2000
Coverage	National	Local	National
Roaming Fee	\$.10/Min	None	\$.25/Min
Internet Access	Included	Excluded	Included
Carrier	Cingular	AT&T	T-Mobile
First Choice	30.32 %	51.34 %	18.34 %
Preference	30.15 %	48.80 %	21.05 %

Without question, the power of any conjoint initiative resides within the simulation capabilities – driven by the underlying design. Online simulators (Figure 1) provide interactive decision support, enabling the practitioner to explore and understand the impact of consumer preferences beyond many traditional reporting methods. The conjoint analysis design principles outlined

tion to identify feature sets for new products, create the best offers and messages, and quantify price and brand impact within the decision making process. And in developing the proper conjoint design, a researcher can identify the optimal product, conduct real-time what-if simulations and substantially increase the probability of success in the marketplace. | Q

ANALYSIS PARALYSIS?

**CURE ANALYSIS PARALYSIS!
GET INFORMATION MOTIVATION.**

In a world of choices, there are a world of answers. Finding out what all those answers mean though is not always a simple task... or quick one.

At Askia our online software delivers exceptional results in realtime, in turn making you look exceptional in front of your clients.

Whether you are considering questionnaire design, telephone, online, face-to-face surveys or statistical analysis, Askia is the smartest, most efficient and cost-effective answer.

There's a multitude of software companies out there. We think the choice is a simple one.

Call us on 212 677 6781 or visit Askia.com to find out more.



A short history of conjoint analysis

The field of marketing research has rarely been the genesis for new statistical models. We've mainly borrowed from other fields. Conjoint analysis and the more recent discrete choice (choice-based conjoint) are no exception, and were developed based on work in the '60s by mathematical psychologists Luce and Tukey, and in the '70s by McFadden (2000 Nobel Prize winner in economics).

Marketers sometimes have thought (or been taught) that the word "conjoint" refers to respondents evaluating features of products or services CONSIDERED JOINTLY. In reality, the adjective conjoint derives from the verb conjoin, meaning "to join together." The key nature of conjoint analysis is that respondents evaluate product profiles composed of multiple conjoined elements (attributes or features). Based on how respondents evaluate the combined elements (the product concepts), we deduce the preference scores that they might have assigned to individual components of the product that

would have resulted in those overall evaluations. Essentially, it is a "back-door" approach (decompositional) to estimating people's preferences for features rather than an explicit (compositional) approach of simply asking respondents to rate the various components. The fundamental premise is that people cannot reliably express how they weight separate features of the product, but we can tease this information out using the more realistic approach of asking for evaluations of product concepts through conjoint analysis.

Let's not deceive ourselves. Human decision-making and the formation of preferences is complex, capricious and ephemeral. Traditional conjoint analysis makes some heroic assumptions, including the proposition that the value of a product is equal to the sum of the value of its parts (i.e., simple additivity), and that complex decision-making can be explained using a limited number of dimensions. Despite the leaps of faith, conjoint analysis tends to work well in practice, and gives managers, engineers

Editor's note: Bryan Orme is vice president of Sawtooth Software, Inc., Sequim, Wash. He can be reached at bryan@sawtoothsoftware.com or at 360-681-2300.

and marketers great insight to reduce uncertainty when facing important decisions. Conjoint analysis isn't perfect, but we don't need it to be. With all its assumptions and imperfections, it still trumps other methods.

Early conjoint analysis (1960s and 1970s)

Just prior to 1970, marketing professor Paul Green recognized that Luce and Tukey's 1964 article on conjoint measurement (published in a non-marketing journal) might be applied to marketing problems to understand how buyers made complex purchase decisions, to estimate preferences and importances for product features, and to predict buyer behavior. Green couldn't have envisioned the profound impact his work on full-profile "card-sort" conjoint analysis would

They can set broken bones, write prescriptions and make or break your research.

High-quality research begins with high-quality respondents. Since 1994 we've been building one of the largest consumer health care panels in the industry, as well as robust panels of ailment sufferers and physicians. Allowing you to reach general consumers, specialists and low-incidence ailment sufferers, fast. Power your research with our experience, our technology and our people.

Greenfield Online is a leading provider of fieldwork solutions and has partnered with some of the largest and most respected research companies in the industry, including: GfK Custom Research Inc., Taylor Nelson Sofres, ORC International, RTi-DFD, M/A/R/C Research, MORPACE International, Inc., Wirthlin Worldwide, MRSI, Harman Atchison Group, Directive Analytics, and more.

Ensure that you are getting the best possible data for your clients – use Greenfield Online for your next research project. Call us directly at 1.866.899.1013 to learn more.



■ Wilton, CT ■ San Francisco, CA ■ Beaconsfield, Bucks, UK



eventually achieve when he and co-author Rao published their historic 1971 article, "Conjoint Measurement for Quantifying Judgmental Data" in the *Journal of Marketing Research* (JMR).

With early full-profile conjoint analysis, researchers carefully con-

Exhibit 1: A Conjoint Card

Made in Europe
Rear-wheel drive
Four-door
\$18,000

structed (based on published catalogs of orthogonal design plans) a deck of conjoint "cards." Each card described a product profile, such as shown in Exhibit 1 for automobiles

Respondents evaluated each of perhaps 18 separate cards, and sorted them in order from best to worst. Based on the observed orderings, researchers could statistically deduce for each individual which attributes were most impor-

tant, and which levels were most preferred. The card-sort approach seemed to work quite well, as long as the number of attributes studied didn't exceed about six. And, researchers soon found that slightly better data could be obtained by asking respondents to rate each card (say, on a 10-point scale of desirability) and using ordinary least squares (regression) analysis to derive the respondent preferences. In the mid-1970s, Green and Wind published an article in the *Harvard Business Review* on measuring consumer judgments for carpet clean-

ers, and business leaders soon took notice of this new method.

Also just prior to 1970, a practitioner named Rich Johnson at Market Facts was working independently to solve a difficult client problem involving a durable goods product and trade-offs among 28 separate product features, each having about five different realizations (levels). The problem was much more complex than those being solved by Green and co-authors with full-profile card-sort conjoint analysis, and Johnson invented a clever method of pairwise trade-offs

Exhibit 2: Johnson's Trade-off Matrix

	Made in USA	Made in Europe	Made in Japan
Front-wheel drive	7	6	3
Rear-wheel drive	9	8	5
All-wheel drive	4	2	1

People have always talked with their hands.



using "trade-off matrices," which he published in JMR in 1974. Rather than asking respondents to evaluate all attributes at the same time (in "full profile"), Johnson broke the problem down into focused trade-offs involving just two attributes at a time. Respondents were asked to rank-order the cells within each table, in terms of preference, for the conjoined levels (Exhibit 2).

Respondents completed a number of these pairwise tables, covering all attributes in the study (but not all possible combinations of attributes). By observing the rank-ordered judgments across the trade-off matrices, Johnson was able to estimate a set of preference scores and attribute importances across the entire list of attributes, again for each individual.

Conjoint analysis in the 1980s

By the early 1980s, conjoint analysis was spreading (at least among researchers and academics possessing statistical knowledge and com-

puter programming skills). Another influential case study had been published by Green and Wind regarding a successful application of conjoint analysis to help Marriott design its new Courtyard hotels. When commercial software became available in 1985, the floodgates were opened. Based on Green's work with full-profile conjoint analysis, Steve Herman and Bretton-Clark software released a software system for the IBM standard.

Also in 1985, Johnson and his new company, Sawtooth Software, released a software system (also for the IBM standard) called ACA (adaptive conjoint analysis). Over many years of working with trade-off matrices, Johnson had discovered that respondents had difficulty dealing with the numerous tables and in providing realistic answers. He discovered that he could program a computer to administer the survey and collect the data. The computer could adapt the survey to each individual in real time, asking

only the most relevant trade-offs in an abbreviated, more user-friendly way that encouraged more realistic responses. Respondents seemed to enjoy taking computer surveys, and they often commented that taking an ACA survey was like "playing a game of chess with the computer."

One of the most exciting aspects of these commercial conjoint analysis programs (traditional full-profile conjoint or ACA) was the inclusion of "what-if" market simulators. Once the preferences of typically hundreds of respondents for an array of product features and levels had been captured, researchers or business managers could test the market acceptance of competitive products in a simulated competitive environment. One simply scored the various product offerings for each individual by summing the preference scores associated with each product alternative. Respondents were projected to "choose" the alternative with the highest preference score. The results

Find out what they mean. Fast.

Today, people are happy to let their fingers do the talking. Itracks can help you gather what they're saying – quickly and accurately.

Itracks provides market researchers with instant information by bringing the speed of the Internet to qualitative and quantitative data collection. Our innovative tools for realtime and bulletin board focus groups let you know what people think – often in frank and candid terms, especially on sensitive issues – as fast as they can type it.

That's why North America's leading market research firms, including **ACNielsen, Ipsos and Harris Interactive**, turn to Itracks for online and telephone data collection.

When you need quality data fast, point to Itracks.



Phone: +1.306.665.5026
Toll-Free (North America Only): +1.888.525.5026
Fax: +1.306.665.2045
e-mail : info@itracks.com
www.itracks.com

Advanced data collection for the market research industry

reflected the percent of respondents in the sample that preferred each product alternative, termed “share of preference.” Managers could make any number of slight modifications to their products and immediately test the likely market response by pressing a button. Under the proper conditions, these shares of preference were fairly predictive of actual market shares. The market simulator took esoteric preference scores (part worth utilities) and converted them into something much more meaningful and actionable for managers (product shares).

Conjoint analysis quickly became the most broadly-used and powerful survey-based technique for measuring and predicting consumer preference. But the mainstreaming of conjoint analysis wasn't without its critics, who argued that making conjoint analysis available to the masses through user-friendly software was akin to “giving dynamite to babies.”

Exhibit 3: Discrete Choice Question

If these were your available options, which car would you choose?

Made in Japan Rear-wheel drive Four-door \$16,000	Made in Europe All-wheel drive Two-door \$20,000	Made in USA Front-wheel drive Four-door \$18,000	None of these
--	---	---	---------------

Those who experienced conjoint analysis in the late 1980s are familiar with the often acrimonious debates that ensued between two polarized camps: those advocating full-profile conjoint analysis and those in favor of ACA. In hindsight, the controversy had both positive and negative consequences. It certainly inspired research into the different merits of the approaches. But it also dampened some of the enthusiasm and probably was a drag on accelerating use of the technique, as some researchers and business managers alike paused to assess the fallout.

Even prior to the release of the

first two commercial conjoint analysis systems, Jordan Louviere and colleagues were adapting the idea of choice analysis among available alternatives and multinomial logit to, among other things, transportation and marketing problems. The groundwork for modeling choice among multiple alternatives had been laid by McFadden in the early 1970s. The concept of choice analysis was attractive: buyers didn't rank or rate a series of products prior to purchase, they simply observed a set of available alternatives (again described on conjoined features) and made a choice. A representative discrete choice question




Mail surveys—from start to finish, we can help

Readex Research's Mail Research Center can help you with your mail survey research. We can handle a project from start to finish, or seamlessly pick up just those steps that you don't want to handle. You can fit us in at any point in the process, from questionnaire design to field work or reporting.

Benefit from our nearly 60 years of mail survey experience. Corporate marketers and researchers, research companies, consulting firms, and advertising agencies use our services for mail studies (and esurveys too).

**Call today to discuss your project 1-800-873-2339
or visit us at www.b2bmrc.com**

 **ReadexResearch**
MAIL RESEARCH CENTER

Experienced. Trusted. Insightful.

involving automobiles is shown in Exhibit 3.

Discrete choice analysis seemed more realistic, natural for respondents, and offered powerful benefits, such as the ability to better model interaction terms (i.e., brand-specific demand curves), cross-effects (i.e., availability effects and cross-elasticities), and the flexibility to incorporate alternative-specific attributes and multiple constant alternatives. But the benefits came at considerable cost: discrete choice questions were an inefficient way to ask respondents questions. Respondents needed to read quite a bit of information before making a choice, and a choice only indicated which alternative was preferred rather than strength of preference. As a result, there wasn't enough information to separately model each respondent's preferences. Rather, aggregate (summary) models of preference were developed across groups of respondents, and these were subject to various problems such as IIA (commonly known as the "red bus/blue bus" problem) and ignorance of the separate preference functions for latent subgroups. Overcoming the problems of aggregation required building ever more complex models to account for availability and cross-effects ("mother logit" models), and most conjoint researchers either didn't have the desire, stomach or ability to build them - not to mention that no easy-to-use commercial software existed for start-to-finish discrete choice analysis. As a result, discrete choice analysis was used by a relatively small and elite group throughout the 1980s.

Conjoint analysis in the 1990s

Whereas the 1980s was characterized by a polarization of conjoint analysts into ideological camps, researchers in the 1990s largely came to recognize that no one conjoint method was the best approach for every problem, and expanded their repertoire. Sawtooth Software influenced and facilitated this movement by publishing research

(much of it forwarded by its users at the Sawtooth Software Conference) demonstrating under what conditions different conjoint methods performed best, and then by developing additional commercial software systems for full-profile conjoint analysis and discrete choice.

Based on industry usage studies conducted by leading academics, ACA was the most widely used conjoint technique and software

system worldwide. By the end of the decade, ACA would yield that position to the surging discrete choice analysis. Two main factors are responsible for discrete choice analysis overtaking ACA and other ratings-based conjoint methods by the turn of the century:

1) The release of commercial software for discrete choice (CBC or choice-based conjoint) by Sawtooth Software in 1993.



Respondent cooperation. Do-not-call lists. Anti-spam blocking. Feel like research is under attack? The freedom to choose the best data collection method for your research project gives you the edge to win the battle.

That's why Western Wats created W.I.R.E.™ (Wats Integrated Research Engine)—The industry's first fully integrated system to field your survey research by phone, Web, IVR or multi-mode. And your survey results are posted on a dedicated website in real-time using the most intuitive reporting engine available—Wats Data Express.

Why limit yourself to one mode when you can use them all? You deserve the power to choose.

No matter what issues challenge research now and in the future, Western Wats will be there with the practical advice and hard work to guide your research project to victory time after time.



(801)373-7735

 **Western Wats**
Data collection you can trust
Partners you can rely on

www.westernwats.com

2) The application of hierarchical Bayes (HB) methods to estimate individual-level models from discrete choice (principally due to articles and tutorials led by Allenby of Ohio State University).

Discrete choice experiments are typically more difficult to design and analyze than traditional full-profile conjoint or ACA. Commercial software made it much easier to design and field studies, while HB made the analysis of choice data seem nearly as straightforward and familiar as for ratings-based conjoint. With individual-level models under HB, the IIA issues and other problems due to aggregation were controlled or entirely solved. This has helped immensely with CBC studies, especially for those designed to investigate the incremental value of line extensions or "me-too" imitation products. While HB transformed the way discrete choice studies were analyzed, it also provided incremental benefits in accuracy for

traditional ratings-based conjoint methods that had always been analyzed at the individual level.

Other important developments during the 1990s included:

- latent class models for segmenting respondents into relatively homogeneous groups, based on preferences;
- Web-based data collection for all main flavors of conjoint/choice analysis;
- improvements in computer technology for rendering and presenting graphics;
- dramatic increases in computing speed and memory made techniques such as HB feasible for common data sets;
- greater understanding of efficient conjoint and choice designs: level balance, level overlap, orthogonality, and utility balance;
- SAS routines developed by Kuhfeld, especially for design of discrete choice plans using computerized searches;
- advances in the power and ease

of use of market simulators (due to commercial software developers, or consultants building simulators within common spreadsheet applications).

The 1990s represented a decade of strong growth for conjoint analysis and its application in a fascinating variety of areas. Conjoint analysis had traditionally been applied to fast-moving consumer goods, technology products and electronics, durables (especially automotive), and a variety of service-based products (such as cell phones, credit cards, banking services). Some other interesting areas of growth for conjoint analysis included design of Web sites, litigation and damages assessment, human resources and employee research, and Web-based sales agents for helping buyers search and make decisions about complex products and services.

Analysts had become so trusting of the technique that the author became aware of some who used conjoint analysis to help them personally decide among cars to buy or even members of the opposite sex to date!

Year 2000 and beyond

Much of the recent research and development in conjoint analysis has focused on doing more with less: stretching the research dollar using IT-based initiatives, reducing the number of questions required of any one respondent with more efficient design plans and HB ("data borrowing") estimation, and reducing the complexity of conjoint questions using partial-profile designs.

Researchers have recently gone to great lengths to make conjoint analysis interviews more closely mimic reality: using animated 3D renditions of product concepts rather than static 2D graphics or pure text descriptions, and designing virtual shopping environments with realistic store aisles and shelves. In some cases the added expense of virtual reality has paid off in better data, in other cases it

13 Alliance Partners
Worldwide

3 Call Centers
in the U. S.



Highest Validation
in the Industry

2 CATI
Systems

*...And now State-Of-The-Art
New Call Center
in Alberta,
Canada*

Issues & Answers

Global Marketing Research



Call Peter J. McGuinness, President,
Carla Lindemann, Executive Vice President,
757.456.1100 or 800.23.ISSUE
Diana Gruenig, Regional Sales Manager
800.729.5127 WWW.ISSANS.COM

has not.

Since 2000, academics have been using HB-related methods to develop more complex models of consumer preference: relaxing the assumptions of additivity by incorporating non-compensatory effects, incorporating other descriptive and motivational variables, modeling the interlinking web of multiple influencers and decision-makers, and linking survey-based discrete choice data with sales data, to name just a few. Additional efforts toward real-time (adaptive) customization of discrete choice designs to reduce the length of surveys and increase the precision of estimates have been published or are underway.

Software developers are continuing to make it easier, faster, more flexible and less expensive to carry out conjoint analysis projects. These software systems often support multiple interviewing formats, including paper-based, PC-based, Web-based and handheld device interviewing. Developers keep a watchful eye on the academic world for new ideas and methods that gain traction and are shown to be reliable and useful in practice.

Commercially-available market simulators are becoming more actionable as they incorporate price and cost information, leading to market simulations based on revenues and profitability rather than just "shares of preference." To reduce the amount of manual effort involved in specifying successive market simulations to find optimal products, automated search routines are now available. These find optimal or near-optimal solutions when dealing with millions of possible product configurations and dozens of competitors - usually within seconds or minutes. This has expanded opportunities for academics in game theory who can study the evolution of markets as they achieve equilibrium, given a series of optimization moves by dueling competitors.

Importantly, more people are becoming proficient in conjoint analysis as the trade is being taught

to new analysts, as academics are including more units on conjoint analysis in business school curricula, as a growing number of seminars and conferences are promoting conjoint training and best practices, and as research is being published and shared more readily over the Internet.

Continues to evolve

Yes, conjoint analysis is 30-plus

years old. But rather than stagnating in middle age, it continues to evolve - transformed by new technology and methodologies, infused by new intellectual talent, and championed by business leaders. It is very much in the robust growth stage of its life cycle. In retrospect, very few would disagree that conjoint analysis represents one of the great success stories in quantitative marketing research. | Q

RESEARCH & STRATEGIC SOLUTIONS:

POWER TO CHANGE YOUR WORLD.



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

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

The MORPACE approach: Power to change your world. Call us today at 248-737-5300, or visit our website at www.morpace.com.



MORPACE International
Market Research and Consulting

Corporate Headquarters: 31700 Middlebelt Road, Farmington Hills, MI 48334 USA 248-737-5300 www.morpace.com
UK Office: 21 Frederick Sanger Road, Guilford Research Park, Guilford, Surrey GU2 7YD UK +44 1483 409900



CAWI and CATI

A side effect of the shift to Internet surveys has been a heightened awareness of the shortcomings of both online and offline research. Some of the early debate got pretty acrimonious, with Internet researchers often defending themselves from accusations of throwing all caution to the wind and using an untried method, so riddled with inadequacies that it could not possibly give the same results as CATI. Except the surprising thing was that it did. Or at least, it came close enough in many cases to fuel a major migration of both custom and continuous research to the Web.

As in most migrations, there was a push as well as a pull. While cost is invariably the pull, in the United States certainly, a major push has been the slump to an abysmally low response to telephone interviews. This not only drives up cost, but undermines the notion that CATI samples are somehow more representative. Just how representative are the 25 million U.S. citizens who are willing to take place in research these days? CATI can no longer claim to be the bench-

mark it once was. And neither have all the concerns about Internet research magically gone away.

An alternative approach is to play to the strengths of both methods and combine them in ways so that each complements the other. An emerging new breed of survey software is starting to make this possible. The trick is to be able to do this without seeing costs rocket skywards or finding the increased technical effort acts as a brake on the initiative.

In this article, I am going to look at specific features offered in six different software products, as to me they represent the leading edge of the aim to unite CATI and CAWI. The actual products are: Askia, a French survey product (www.askia.com); Bellview Fusion from Pulse Train (www.pulsetrain.co.uk); Jambo from IDfix, a Dutch software company (<http://jambo.idfix.nl>); MI Pro Research Studio from Norway (www.mipro.no); NEBU, again from Holland (www.nebu.com); and VOXCO from Canada (www.voxco.com).

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.

The case for dual tracking

From inquiries I have made recently, both in North America and Europe, the majority of research companies now seem to be undertaking some mixed-mode research, often in response to client demand, and usually rather infrequently. Of all the combinations, CATI and CAWI appears to be the most common coupling.

At this stage, mixed-mode may be seen as the exception that proves the rule, but there is definitely a desire to do more. In a survey of over 200 research companies carried out by my firm, Meaning, in March, 24 percent considered mixed-mode support to be "essential" and 84 percent thought it was important or useful to some extent.

The reasons for mixing modes vary widely. For some, it is simply to

Proud sponsor of the
American Marketing Association.

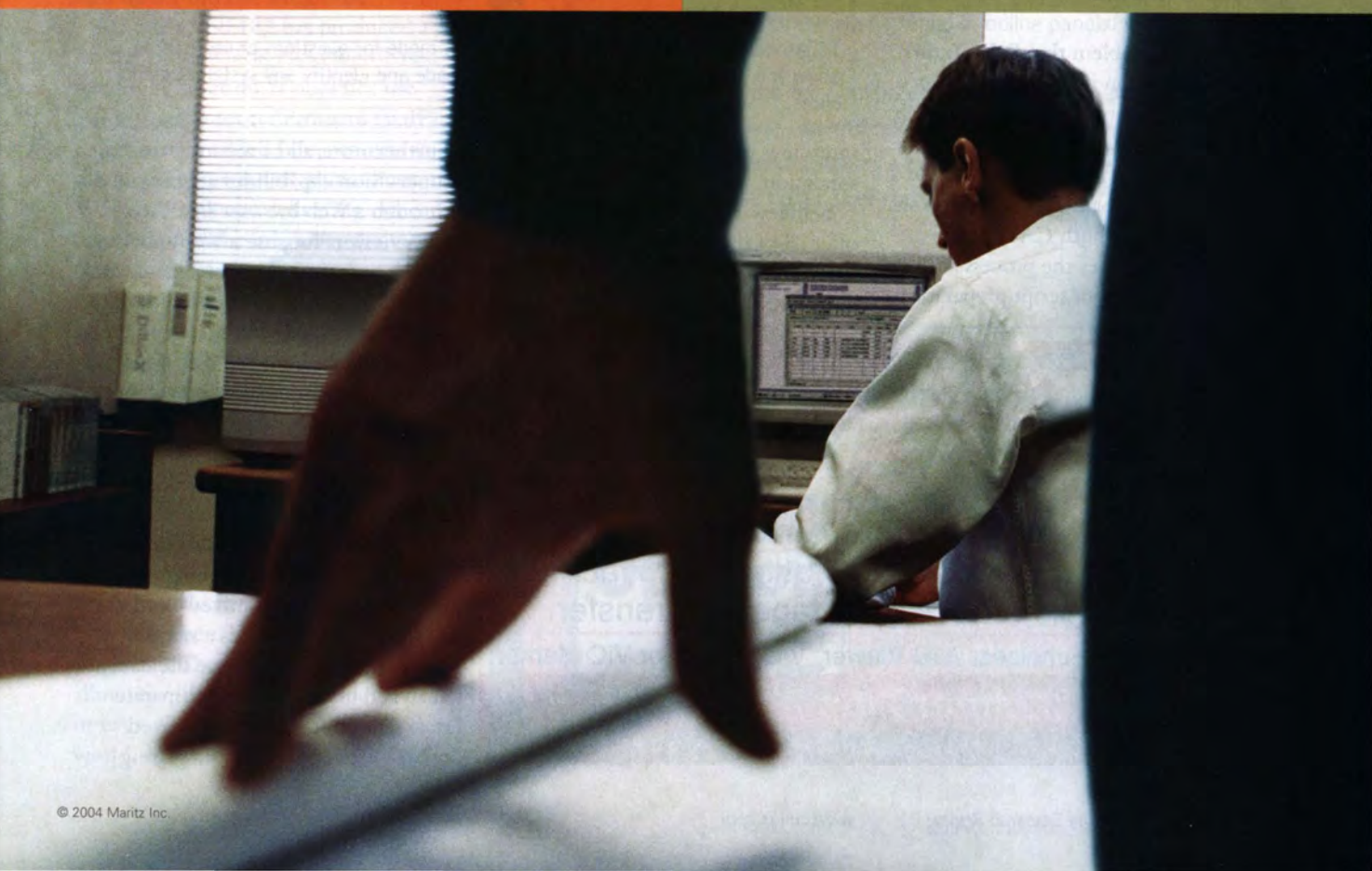
Most research can tell you where you've been. We focus on where you're headed. First, we look at all dimensions of your customers—why they choose who they choose, what are the pivotal points in the relationship, and why they leave or come back. Then we turn that information into intelligence you can use to reach the next level. And ideas on how to get there.

To learn more, visit maritzresearch.com, or call (877) 4 MARITZ to request a free white paper, "Delivering Your Brand Promises Profitably."



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

(We contend it's a map.)



streamline the production of all surveys through one technological process, but for others, the benefits are in improving response by being able to offer respondents choice over how to complete the survey.

Social researchers find mixed-mode research attractive, as it can overcome coverage deficiencies of a single mode, especially when working to much higher levels of required participation. But even where coverage is not the issue, offering more than one mode can work wonders on response rates.

Switching mid-flow can provide a welcome boost to response, as John Allison and Chris O'Konis observed in the July/August 2002 issue of *Quirk's* ("If Given the Choice," p. 20), but it is important to be able to perform the switch instantly, not in a day's time, otherwise the response improvement will be lost.

Hiding the complexity

The greatest problem to overcome is the added complexity of pursuing interviews through two parallel channels while synchronizing the results. You may be using the same software, but you may still end up with two different scripts, one for CATI and one for the Web.

This is a problem that Pulse Train's Bellview Fusion initiative tackles at the roots. Previously its Bellview Web and Bellview CATI systems required different scripts and produced separate results databases. Bellview Fusion, which supports both CATI and CAWI, streamlines the process at the key pinch points of script preparation,

interview switching and results consolidation.

Bellview Fusion does not quite offer all of the functionality of the Bellview CATI platform yet, but it is close and the gap is closing.

Things to look for in CATI/CAWI software

1. Consolidated scripting: ability to write one script that will execute perfectly in both CATI and CAWI modes.
2. Independence between design and execution, so that look-and-feel considerations are applied externally.
3. Mode-specific tests: so that the wording can be different for interviewer-administered CATI and self-completion CAWI, and that this can be done independently of any multilingual support.
4. Consolidated results database containing both incomplete and complete interviewing work for both CATI and CAWI.
5. Mode-sensitive contacts: the ability to take the sample subject's preference for contact by phone or Web into account when making the initial contact.
6. Efficient switching between modes, initiated by the script or by the respondent.
7. Answer concealment: the facility to hide any interviewer-recorded data and prevent this from being changed when switching to self-completion modes.
8. Fall back: ability to switch back, manually and automatically, if the interview remains incomplete after switching from CATI to CAWI or vice versa.
9. Single view management and reporting, which identifies response by mode.
10. Quota controls implemented for the whole study, regardless of mode, and enforced in real time.
11. Question constructs for mixed-mode, e.g., the means to handle unprompted questions for CAWI, and the ability to have mode-specific answer categories for "don't know" and "not stated" which are presented in CATI but concealed in CAWI.
12. Modal trace: recording the respondent's mode for questions or sections, to allow you to compare answers from each mode and identify any systematic differences.

Furthermore, all of the interviewing supervision capabilities are provided through a Web browser interface. Interviewers too, use a Web browser interface to complete interviews. But importantly, they get a different view of the survey script to the respondent self-completing on the Web. This allows, for example, for the prompts to differ, and for more options to be available.

All six CATI/CAWI products feed back results from either channel directly into one common database. This overcomes one of the greatest stumbling blocks in mixed-mode research, where there is a massive penalty to pay at the time the data are analyzed in reformatting disparate data files to create a standardized record for analysis. It is surprising

Tired of tape?

save time.
save space.



Video powered by
Interclipper

Get your focus groups on CD at over 115 facilities nationwide. Or send us your tapes for transfer.

Three affordable choices: ViC Viewer, ViC Clipper or ViC Marker.

Check our site
for the latest
facility list.

InterClipper
www.vicCD.com

973-733-3434
(Fax) 973-733-3440
info@vicCD.com

how much of the widely-used data collection products still do not make this easy.

Virtual CATI

Two other suppliers, VOXCO, with its Interviewer VCC (Virtual CATI Center) and NEBU, with its standard, flagship product, have produced truly industrial-strength Web-based CATI solutions. These too provide a complete range of professional CATI supervision and management capabilities. Interestingly, Web CATI frees the CATI operator from having to house all its interviewers under one roof – and brings Web interviewing into the bargain.

VOXCO, if anything, offers greater sophistication in its scripting capabilities, and it integrates tightly with its other professional research tools for analysis, such as STAT-XP. NEBU may appeal more to the smaller operator that does not want to invest in technical specialists. The solution sits in the center of a complete workflow model, which includes survey management and job costing, interviewer scheduling and payments.

Interviewers can even log in over the Internet, notify their availability and sign up for interviewing shifts.

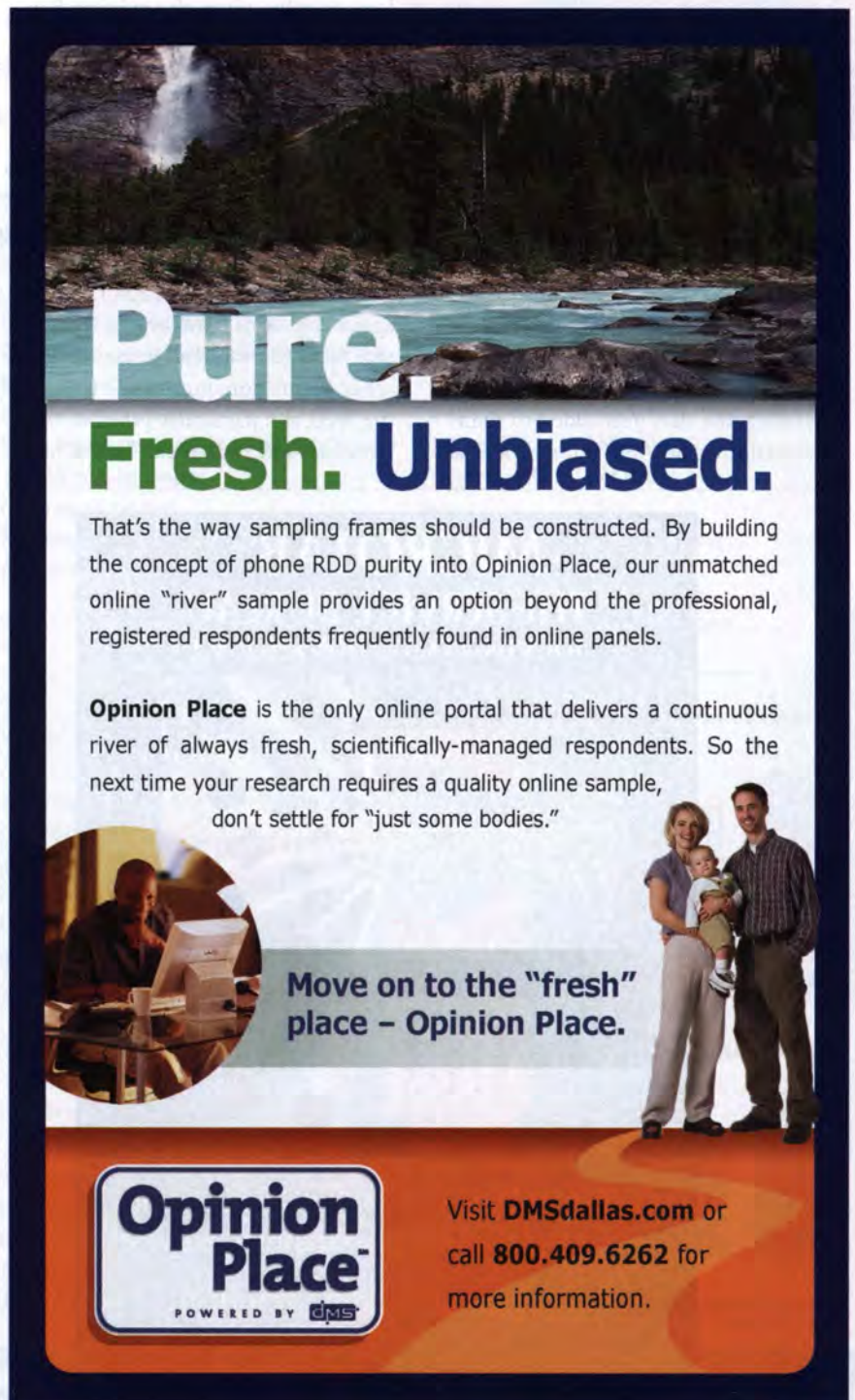
Moreover, NEBU has produced a (so far) unique integrated Web-based telephony solution. It does not use Voice Over Internet Protocol (VoIP), that much-heralded Internet alternative to using terrestrial phone lines. With VoIP still not delivering either the quality or the reliability the CATI operator requires, this is no bad thing. Instead, it uses a virtual dialer, which is one central, physical dialer that places the calls over the terrestrial phone network. When an interview is due to start, the CATI system communicates with the dialer over the Internet. The dialer then phones the respondent and the interviewer and connects the two. Although it involves two call segments, NEBU's purchasing power means that, overall, call costs need be no higher than a typical single call. The same technology also allows for listening in, by supervisors or even clients, from anywhere in the world, which overcomes a major

quality issue with distributed interviewing.

Write once, and to the same place

MI Pro's Research Studio is remarkable for its openness, as all of the definitions and communications between the different modules take place in XML. This makes the system inherently Internet-friendly, and also makes it easy to extend the system and add

your own custom facilities, whether that is a proprietary conjoint module, or an address lookup facility. When you start to program a script, you can indicate that the survey will be deployed on both CATI and CAWI, and it will recognize key differences in the way questions are handled by these two channels automatically. It will also ensure that the data are all stored in the same results database. Another bonus with MI Pro is that,




Pure.
Fresh. Unbiased.

That's the way sampling frames should be constructed. By building the concept of phone RDD purity into Opinion Place, our unmatched online "river" sample provides an option beyond the professional, registered respondents frequently found in online panels.

Opinion Place is the only online portal that delivers a continuous river of always fresh, scientifically-managed respondents. So the next time your research requires a quality online sample, don't settle for "just some bodies."

Move on to the "fresh" place – Opinion Place.



Visit DMSdallas.com or call **800.409.6262** for more information.

unlike many other systems that are strong on the data collection side but lack power on the analytical side, MI Pro goes the whole nine yards, with powerful statistics, data visualization and astonishing Excel and PowerPoint integration.

Askia also takes a sensible, mode-aware approach to defining surveys. One script will self-adjust, through the application of different templates for Web and CATI that will automatically give questions and screens a different look and feel for interviewers and for Web respondents. Behind it, one consolidated results database collects interviews from the Web and from CATI at the same time.

Jambo takes this one stage further, and rolls the ideas of custom surveys, continuous surveys and panels into one by creating one super-results database for every question you ever ask, whether on the Web, on the phone or by some other channel. Every time a respondent is interviewed, the data gets added to their virtual interview record, and this can

then be used when sampling for another study. The availability of all the data in one place, and the ability to share questions (and respondents) across quite different studies not only delivers 70 percent of the functionality needed to build a panel, but even allows you to start benchmarking results. It is quite challenging stuff!

A switch in time

Technologically, real-time switching is one of the most complex of the problems to solve, given the existing heritage of most research software. To be effective in improving response, you must be able to switch a respondent from, say, phone to Web virtually instantly. Among the best at doing this are Askia, NEBU, Pulse Train and Jambo.

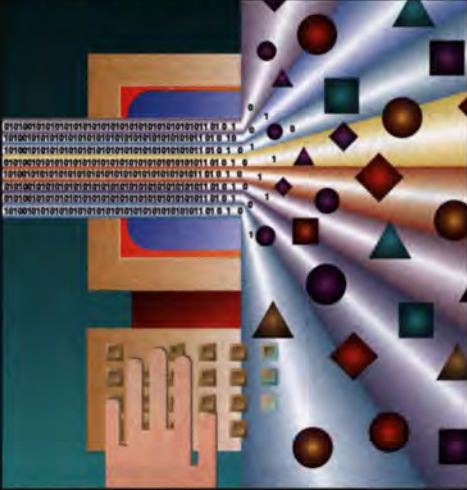
NEBU offers a "hard" and a "soft" switch from CATI to CAWI, or back again. You use a hard switch when you want to switch all respondents, or when all are agreeing to continue on the Web, at a particular point in the switch. A soft switch can be called up

anywhere by the interviewer or the respondent, as you define. Switching from CATI to CAWI will automatically capture e-mail address and generate a personalized e-mail invitation to the respondent. A switch from CAWI will schedule a call from an interviewer. Importantly, the answers to any questions asked by interviewers will be concealed from respondents self-completing, and they cannot go back and change them either.

There is something similar in Bellview Fusion, including a "call me" button that can be incorporated into a CAWI interview to switch the interview to CATI in real time. In Jambo, a sophisticated call switching screen allows you to set up switching rules between all the modes supported. It will even revert calls back to the previous mode, such as back to CATI, if the Web interview is not started by the respondent within a day or two.

Good technology can only aid good design

While it is good to see software developers taking seriously the needs of researchers who must to combine CATI and Web interviewing, the technology can only ever be the enabler to good practice. Whether mixing modes is appropriate or justifiable is a judgment call only the researcher can answer. Fortunately, the benefits do seem to outweigh the disadvantages, a view supported by leading research methodologists, such as Mick Couper and Don Dillman. Unfortunately, the technology already in place may not always be the most fit for the purpose, and if that means an existing CATI solution, it is not easily overcome. If you are not sure, you may find the accompanying checklist of mixed-mode features useful in assessing your fitness for CATI/CAWI research - or in concentrating your supplier's mind on the task ahead. | Q



MICROTAB[®]
THE SERVICE BUREAU
YOUR DATA TABULATION RESOURCE

Coding & Data Entry Statistical Testing
Cross Tabulations Graphing Services

LET US SPOIL YOU!

866-642-7682 www.microtab.com



To read the article referenced above, visit www.quirks.com and enter Article QuickLink number 1021.

A fresh approach to online market research.



e-Rewards uses its targeted e-mail panels to deliver high-quality research sample in a fraction of the time and at a fraction of the cost of other research methods. No one is better at delivering broad-based audiences or niche respondents, including two elusive segments: affluent consumers and corporate executives.



Advantages of e-Rewards Market Research Services

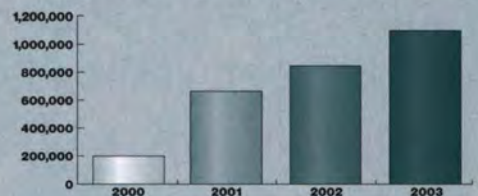
	<u>e-Rewards</u>	<u>Others</u>
Panel segmentation level	Ultra-high	Moderate
Qualified quota sample guarantee	Yes	Maybe
Effective reach	High	Limited
Speed of delivery	Days	Weeks or Months
Low-incidence study delivery	Fully capable	Not likely
100% opt-in panel	Fully compliant	At risk
Business panel	Yes	No
Respondent incentives	Built-in	Outsourced
Performance-based pricing	Yes	Maybe

As a CASRO member, we subscribe to the Code of Standards and Ethics for Survey Research established by the Council of American Survey Research Organizations.

e-Rewards Consumer™ Panel

- Over 1,000,000 consumers
- 300+ profile dimensions
- Exceptional targeting ability
- Normalized sampling
- Low-incidence study delivery
- 15–25% survey response rates
- Fast and accurate results
- Performance-based pricing

e-Rewards Consumer™ Panel Growth

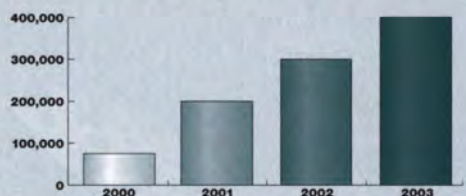


Typical e-Rewards Consumer™ panel survey response rates average 15-25%.

e-Rewards for Business™ Panel

- 400,000 decision-makers and influencers
- 700,000 occupational profiles
- Hard-to-reach executive targets
- Over 40 business profile dimensions
- Balanced representation
- 25–35% survey response rates
- Dependable delivery
- Quick turnaround
- Performance-based pricing

e-Rewards for Business™ Panel Growth



Typical e-Rewards for Business™ panel survey response rates average 25-35%.

For custom research project quotes, please contact Kurt Knapton, Senior Vice President of Research Services, at 1-888-20-EMAIL (1-888-203-6245) or visit e-rewards.com/researchers.

The theme is fun

Mark Kupferman has an unfair advantage over a lot of his fellow researchers. While others have to subject their respondents to attribute batteries on laundry detergents or foot powders, he gets to ask people about roller coasters and water parks.

Kupferman is corporate director of research for Paramount Parks, the theme-park division of entertainment giant Viacom. With annual revenues of \$500 million, Paramount Parks owns and operates theme parks around the globe, including Paramount's Kings Island

(Cincinnati), Paramount's Great America (San Francisco), Paramount's Carowinds (Charlotte, N.C.), Paramount Canada's Wonderland (Toronto), Star Trek: The Experience (Las Vegas), and Terra Mitica (Benedorm, Spain). Together the various

properties attract over 12 million visitors annually.

Basically a one-person marketing research staff, Kupferman is very busy. Paramount Parks has an online consumer panel and also conducts a host of other online and offline projects throughout the year to measure guest satisfaction with the parks' rides, dining, shopping, games and shows. The main vehicle for much of the company's online surveying is Inquisite, a software package from the Austin, Texas-based firm of the same name.

Online surveys help Paramount Parks keep respondents and visitors happy

Now boasting about 14,000 participants, the online panel (which debuted in 2003) is always welcoming new members. "When guests take one of our other surveys, at the end we invite them to sign up to be on the panel, which mostly means we will send them an invitation to take surveys whenever it makes sense. We don't require someone to take a minimum number of surveys. Depending on the survey, 30 to 40 percent will complete whatever we send them within one or two days," Kupferman says.

Paramount Parks is able to draw prospective respondents from a



database of about 500,000 e-mail addresses of park visitors obtained from various sources, including those who have signed up to receive the company's online newsletter. "We were spending a lot of money trying to recruit people to take our surveys and we finally

realized that our greatest source of potential respondents was really our Web site. One of the reasons we created the newsletter - which people sign up for at the Web site - is to generate leads for our guest feedback initiatives. In light of all the issues surrounding spam and CAN-SPAM we need to give people a reason to receive e-mail from us," Kupferman says.

Some research participants have come from the ranks of visitors who responded to cards randomly handed out at the parks inviting them to complete an online survey about their experience when they get home for the chance to win a





prize. About 18,000 people responded in 2003, Kupferman says. "We found out that the only people we could really count on to take our online surveys, regardless of the prize, are those people who have at least some interest in visiting theme parks. So, while we can't use online surveying as a way to find out what percentage of the overall population is going to visit our park, we can use it to answer

questions about how people experience and want to experience our parks from the perspective of those who have at least some interest in visiting us. And there are plenty of them!"

As proof of just how far the zeal of Paramount Parks' guests extends, Kupferman even got a nice response to a survey on coupons. "I can't think of anything more tedious than the survey on coupons we sent out this spring. Plus it was a lengthy survey - there were nine pages with many questions and rankings - and we had something like 2,000 responses."

Conduct more surveys

Kupferman says Inquisitive allows him to conduct a lot more surveys than he has in the past. "We have changed things about our business that we never would have thought to change because we never could have afforded to ask the questions before. For example, some of the rides we have put in are based almost entirely on what people told

us, from the general theme of the ride all the way down to the details and what they told us they wanted from the experience."

In one survey, respondents were given a list of Paramount movies and were asked what kind of rides the movies might make. "When you ask a question like that, you get a lot of very interesting ideas from people. We can then go back a few days later and ask that same group or a different group, 'All right, we are looking at doing a ride based on a brand like Star Trek, and we are going to make it a roller coaster. What do you see as being part of that experience?' And you can really delve into it. We get to ask questions that we ordinarily could never have asked because it would have cost us so much money."

Kupferman periodically does side-by-side projects using both Inquisitive and other surveying methods to compare the findings. "In many cases, when we've hired a research company to do a project for us, we've duplicated the survey online. Our learning so far is that we pretty much get the same result.

"We rarely take the percentages that come out of what we get from the online surveys as being the actual percentage of people who are going to do what they say they are going to do. It's difficult to draw a direct correlation. However, ratios between responses tend to make sense - if 20 percent of the people say they are going to do

Applying Knowledge
Improving Decisions™

Burke
INCORPORATED

Burke provides decision support services for marketing, operations, quality and human resources. We acquire, integrate, analyze, and most importantly **apply** knowledge across your enterprise.

www.burke.com

→ **Make the right decision**

something versus 10 percent of another group who say they are going to do it, there is a relationship there that usually makes sense.”

The software comes with its own report-generating system and Kupferman also uses other systems to package and distribute findings.

“We have changed things about our business that we never would have thought to change because we never could have afforded to ask the questions before.”

Some information is widely disseminated and some is limited to those in a need-to-know position. “Results from the guest satisfaction surveys are distributed to each area of each of our parks on a weekly basis and are used to make almost immediate adjustments to the way we satisfy our guests,” Kupferman says.

He also uses the Inquisite-based research to help company management gauge advertising awareness and assess guest visitation plans. “In terms of advertising, we’ve used Inquisite to survey guests about what they thought about our TV commercials before we air them. During the season, we use it to understand our guests’ awareness of

A Whirl of Possibilities

Gathering ...

- **Custom Research** provides the diversity you need
- **EXCELSM Omnibus** collects critical consumer information quickly and inexpensively
- **SmallBizEXCELSM Omnibus** taps the vital market of small companies (up to 100 employees) for business-to-business studies
- **TeenEXCELSM Omnibus** is a cost-effective alternative to reach 12- to 17-year-olds
- **Web-Based Consumer Panel** delivers quick, easy access to the online population
- **Expert Web, Mail, and Intercept Surveys** work when telephone research doesn't fit your needs
- **Sampling Models** offer complex research designs and efficient representations of elite populations
- **International Research** is conducted in over 70 countries to let you reach around the world
- **In-House Facilities** ensure quality

... Insight

- **Multivariate Analytical Support** yields actionable answers to your research questions
- **Corporate Branding Model** determines your marketplace position by employing exclusive elements for true market comparisons
- **Customer Satisfaction and Loyalty Research and Implementation** identify your most valuable customers and maintain their loyalty
- **RACERSM** delivers and sorts large-scale projects through a unique, efficient web-based service
- **Specialized Expertise** brings added value to utility, technology, religion, social sciences, cable television, financial, retail, packaged goods, healthcare, and public relations clients
- **Economic Forecasting, Modeling, and Database Development and Management** convert information into insight for maximum benefit

We Gather Insight.



INTERNATIONAL COMMUNICATIONS RESEARCH

(484) 840-4300

WWW.ICRSURVEY.COM

ICR@ICRSURVEY.COM

MEDIA, PA (HQ)

DALLAS, TX

NEW YORK, NY

SAN FRANCISCO, CA



ers didn't.

"There is always somebody who is interested in the answers, and some of the nuggets we get are proving to be very valuable. Ultimately it's all directional. The research doesn't tell us what to do, but it does give us a better indication of what our guests think about our parks and the services we offer. Because it is relatively easy to do the surveys - and this is one of the most useful things that Inquisite has done for us - it's now possible to delve further into what guests really think about issues that are

our advertising and to find out their intent to visit our parks. At the end of the season, we use it yet again to understand why some consumers visited our parks, while oth-

important to their experience at our parks."

Automating processes

Lately, Kupferman has been spend-

ing his time automating some processes, such as those for the conducting, analysis and reporting of tracking surveys. "That should help us out because we are doing so much research and collecting a lot of data, and we aren't getting to it as quickly as we'd like. We're working on ways to deal with that but it is hard, for example, to turn down any of our departments when they have a really good idea for a survey. Ultimately we prioritize and do the best we can to fit it all in over time."

Win-win

Along with having some fun taking surveys, the respondents seem to realize that their opinions and their effort will, in the long run, result in a better experience for their families. "We do try to treat all the people with respect and we thank them a hundred times over for helping us. We like to think they are taking the survey because they have an interest in making the park better. In the Charlotte market, for example, the closest theme park is 300 miles away. So if people want a better theme park experience, then they are going to have to tell us what they want. People want to help improve this place to make it a great place for their family.

"It's a win-win. At our park in Cincinnati, we put in a new water park, almost 100 percent as a result of feedback people gave us. We asked what did they like and not like about the existing water park. And they said, 'There is too much concrete.' 'The rides are great but there is no place to sit down, no shade.' Well, for our new product we redeveloped the entire water park, we put in trees, we put things closer together, we created what we called Water Park Resort. We upgraded the services and the amenities to create something unlike anything in the region - all based on what people said they want.

"All of this comes out of being able to do a lot of research in rela-

We're reaching
around the world
to connect with
your customers
so they stay
connected to you.

Keeping your
customers loyal
means keeping
your customers.



Market Probe

Trust our experience ~ Discover our innovation

www.marketprobe.com

**Information. Insight.
Impact.**

We make research powerful.

M/A/R/C draws insightful conclusions and accurately predicts results. Our proven ability to impact your bottom line is based on knowledge of your industry, and a service philosophy that has 100% of clients considering us again. For Marketing Research and Consulting, call the company that will have a positive impact on your business.



800.884.MARC (6272) www.marcresearch.com



certainly not three or four surveys, if we had to pay for all of the responses.”

Even the site-specific research ends up being helpful to parks in other regions, because learning from the surveys can often have applications elsewhere. “We have five theme parks in North America, and we try to send out surveys to all the markets, because even if we might not be putting a water park in our Charlotte park, for example, we might someday and understanding the differences between people in different markets helps us a lot.

“This year we are

doing a lot more of the ‘why,’ trying to understand people in different demographic and income groups – who likes what, why they like it, etc. We ask them about what

other activities they are going to do to understand the basis on which they are making decisions, not just for marketing purposes but also for planning the attractions in the park.”

In-park research

The firm also conducts a lot of in-park research that can’t be duplicated online, ranging from point-of-origin surveys to find out who is visiting the properties to overall quality surveys administered to a random sample of visitors as they exit the parks. “Surveys that can be done quickly and quantitatively, such as our weekly survey in our dining venues to find out guest satisfaction, it wouldn’t make sense doing that online. Or when people leave our parks, they don’t want to spend 20 minutes doing a survey. They are tired and hot and ready to head home. But if we can have them do a quick in-person survey and then let them take a survey when they get home about their more in-depth experience, that seems to be working.”

The in-person surveys are done with a mix of handheld and paper-and-pencil methods. While online and other electronic methods have been a boon, sometimes the old-fashioned methods work well too. “At our Canadian parks, the in-person surveys are often done with handheld electronic devices but in the U.S. parks we’ve found that that can take a lot more time than just handing people a clipboard and saying, ‘Please fill this out.’ Especially when you are dealing with rating questions like, ‘On a scale of 1-10, how would you rate the following things?’ it’s simpler for you to just look at the list and check the right boxes as opposed to me reading them to you. It seems that we get a lot more completes that way.”

If you can’t make the surveys fun, at least make them easy, right? | Q

tively short amount of time. The water park thing we would not have done. We probably would not have spent \$30,000-\$40,000 to do a major survey on our water park,

Relax

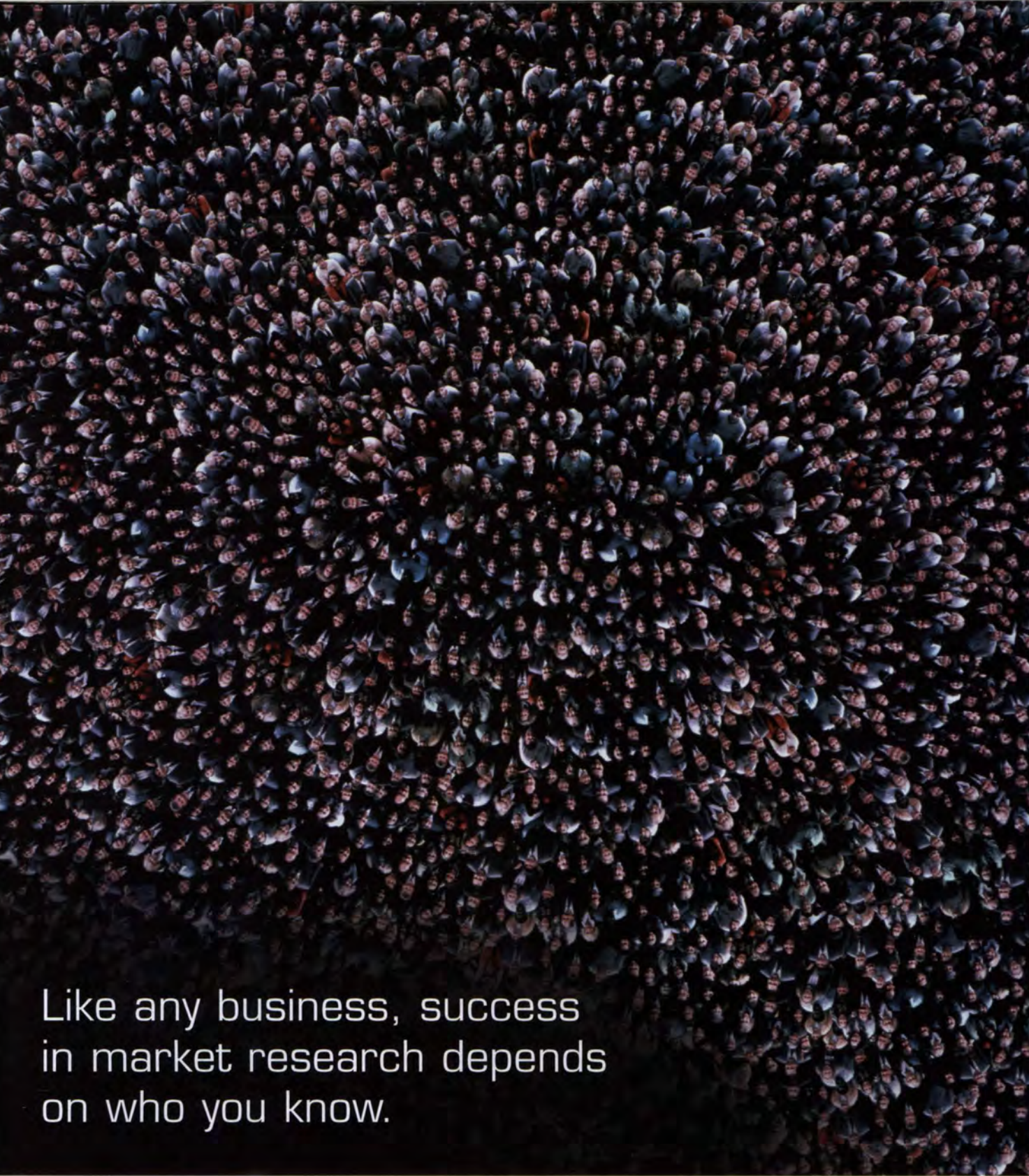
and turn to Midwest Video

Video Production Services
for all of your Market Research Activities!

MIDWEST VIDEO
COMMUNICATION SERVICES

ph: 248.583.3630
1515 Souter
Troy, MI 48083
www.midwestvideo.com

29 Years Experience • All Digital • Nationwide Coverage • Staging • On-site Transcription
Videoconferencing • Webcasting • Experience in 22 Countries



Like any business, success
in market research depends
on who you know.

Get to know Luth Research, and we'll introduce you to the 2.5 million people worldwide in our **SurveySavvy** online panel. What makes our SurveySavvy panel so special? It was built using patented internet technology by market research professionals with 27 years of experience. In fact, Luth Research offers a complete range of research services, from all methodologies of data collection to sample-only solutions. Learn how we can make your next project more successful. Visit luthresearch.com or call 800-465-5884.

LUTH
research

How to catch a cheat

In the early days of Internet research, a commonly heard objection was that “you can’t tell if the person you’re corresponding with is really the person he or she appears to be.” Despite many improvements to Web-based survey data collection techniques and security technologies, this early perception persists. This article discusses many of the modern tools that are being used to make sure that the vast majority of “survey cheaters” are identified and deleted from the final analysis.

First of all, let’s define what constitutes a cheater. Because many Web surveys offer some sort of incentive (and since individual pay-per-completes are becoming more common), there can be quite a bit of motivation to attempt to submit multiple surveys and/or to take surveys but not pay attention to the tasks or questions. We consider both of these acts to be inappropriate survey behavior and attempt, wherever possible, to withhold rewards for such mischief.

Some cheaters are very easy to catch and remove from the data; others require a bit more stealth and internal logic checking. But before we discuss actual techniques for defeating cheaters, you might find it interesting to know that while we inform cheaters that they’ve been busted and won’t be getting any incentive, we rarely tell them how we caught them. This is because, just like in Vegas, once you tell a cheater how you can tell they’re cheating, they become even more innovative – something we’d all like to avoid. With that in mind, we’ll assume that no survey cheaters read *Quirk’s Marketing Research Review*.

Three points

To begin, there are three points at which you can catch online survey cheaters: prior to the invitation, during the survey and in the analysis of incentive fulfillment data.

All major research associations (IMRO, AMA, MRA, ARF, CASRO and others) have adopted codes of ethics that require lists of potential respondents (not including Web site

intercepts) to have one of two characteristics: they must have either a prior opt-in for contact, or the individuals on the list must have a prior, existing business relationship with the sender through which an e-mail contact would not be considered a random, unsolicited broadcast commercial e-mail (spam). This requires most researchers to rely on online panels, customer databases or opt-in lists.

Providers of these panelists and lists regularly scan profiling and opt-in



By Bill MacElroy

Techniques for identifying problem respondents in online surveys

Editor’s note: Bill MacElroy is president of Socratic Technologies, Inc., a San Francisco research firm. He can be reached at bill.macelroy@sotech.com.

Go ahead...jump.



Sometimes it's tough to make the leap without knowing what you're diving into. How do you find a research service provider you can trust? At Decipher, we understand the stakes and take our responsibility seriously to provide you with clean, accurate data as quickly as possible.

Our process was designed by researchers for researchers, allowing our customer service team to deliver results you can trust. So come on in...the water's nice.



DECIPHER

Proceed with confidence.

UNLEASH THE POWER OF INTERNET SURVEYS.

LET THE EXPERTS AT COMMON KNOWLEDGE

HELP YOU ACROSS THE DIGITAL DIVIDE.

data for duplicated Internet server addresses, series of similar addresses (abc@hotmail, bcd@hotmail, cde@hotmail, etc.), replicated mailing address (for incentive checks), and other data that might indicate multiple sign-ups by the same individual.

Sophisticated systems now use an algorithm to compare the values of many profiling fields to produce a cheating probability score (CPS) for each panelist. Each profile data point is assigned a weight and the number of similarities between the data points will contribute to a total CPS; the higher the score, the higher the probability that a membership is an attempted duplicate. People with high CPSs are quietly removed on a regular basis, without notification, in order to prevent the possibility of multiple invitations to the same individual. Many companies using their own client lists or building their own internal panels follow similar precautions.

At the time of the survey, a com-

mon solution is to utilize many simultaneous tests of Internet addresses and tags to screen for cheaters. Note: the use of cookies as the sole alternative for preventing multiple submissions is now considered inadequate because so many people know how to delete or defeat these tracking tags. However, cookies in combination with IP detection and a time threshold limit of IP address (e.g., no multiple submissions from the same address in x number of minutes) can defeat many cheating attempts.

In addition, most survey organizations are now using a seeded database approach to inviting participants by e-mail. This is called a handshake. A handshake is a real-time information exchange between the interactive database and the survey taker. This entails creating a series of unique URL links to the Web survey which are embedded in the e-mail invitation. Once a unique code link is used, no one else should be able to re-use that link.

These unique URLs should be different enough so that invitees can't easily figure out how to copy the link and change the address to gain entrance multiple times. For example, some do-it-yourself survey programs use a series of consecutive numbers at the end of the URL, which can be easily copied, pasted and then incremented or decremented to gain access (e.g., using a URL like "http://surveyorg.com/survey/?pid=101" is an open invitation to paste this address into the browser and try "?pid=102"). Using tagging components that are random, complex and/or contain symbols, prevents most multiple submission attempts.

Screen 'em out

Once an invitation has been sent, it is important to screen out cheaters who use a type of technology called automatic field-populating applications. These allow tech-savvy cheaters to capture the clicks used to complete one survey and then simply replicate



Advanced, Proven Internet Technology

Cross the digital divide with Common Knowledge helping you negotiate every turn. We combine advanced, but proven, technology with more than 15 years of solid marketing research experience. We can quickly put the full potential of Internet surveys and comprehensive online reporting solutions to work for you.

Experience and Expertise

Our proprietary software, coupled with our experienced on-staff programmers, enables us to expertly program any customized Internet survey. However you design it, we can program it — from complex logic and algorithms, to simultaneous row and column rotation. Static or timed exposure graphics, sound, video and various interactive visual stimuli are all part of our everyday programming.

Your2Cents™, Common Knowledge's online survey panel, can provide you with access to millions of Internet-connected households, individuals, teens and businesses — including small business owners, IT professionals and medical professionals — across the nation and around the world.

This panel's profiling information not only includes demographic information on the panel member, but the entire household, as well as in-depth information on more than a dozen major interest, usage and purchase categories. This lets us pull a more targeted sample and deliver completed surveys quickly and inexpensively.



Flexibility

At Common Knowledge, we stress above all our flexibility to deliver what our clients need, the way they need it, when they need it. Contact the experts at Common Knowledge today to discuss putting our digital data collection and reporting solutions to work for you.



ADVANCING MARKETING RESEARCH™



16200 Dallas Parkway, Suite 140 • Dallas, TX 75248-2684 • 800-710-9147 • Fax: 972-732-1447
 info@commonknowledge.com • www.commonknowledge.com

the same entries using other aliases that they have used to create “multiple personalities” in the panel or list. Some of these are very hard to detect (e.g., Sam in Houston may also be Sally in Hudson, etc.). A field populator helps these folks expedite their cheating by filling in all the answers at lightning speed. So not only are they cheaters, they're lazy cheaters.

By running real-time data matching algorithms and/or text field matching applications, the duplicate records (including the original) can usually be found and eliminated so that replacement interviews can be completed before field is closed. The matching criteria should be set high enough to detect probable duplicates (90+ percent exact matches), but in cases where there is a high degree of consistency in the market's opinion, some managerial discretion may need to be applied.

Another way to avoid these types of cheating technologies is to create another kind of handshake which

includes a code embedded within a complex graphic. This handshake involves information entry or a task in which the respondent enters a code that is invisible to most bots (a type of automated digital scanning software). Sometimes this is accomplished through the use of random numbers and letters that are contained in dense graphic field which the respondent then retypes as a password for entrance into the survey. So far most automatic field populating applications have been unable to read the code through these complex graphic backgrounds (although computer scientists at UC Berkeley working in conjunction with Yahoo! have developed several algorithms that are getting very good at reading through this type of screening handshake).

For example, humans can read distorted text like that shown below but most current computer programs can't. If the data received does not match the data sent, then the multiple attempts can be detected and rejected.



Get the cash

The second type of cheater is someone who responds to a survey but who rushes through the questions without thinking in order to gain some incentive reward. Amazingly, some “Get Paid for Survey Taking” sites actually give people pointers as to how they can get through surveys quickly and get the cash. This is where another form of cheat-detecting technology comes into play: pattern recognition.

Pattern recognition looks for several types of bad survey behavior. These types of detection algorithms look for people who simply “straight line” the survey (e.g., taking the first choice on every answer set or entering

4,4,4,4,4, on a matrix, etc.) and those who zig-zag or “Christmas tree” their answers (e.g. 1,2,3,4,5,4,3,2,1, etc.). In either case, when this behavior is detected, the survey is terminated and the offending respondent is usually tagged for permanent removal from the sample source. Once again, the cheaters generally are not alerted to the fact that they’ve been tagged; they just never receive any other invitations.

dent tagged for quiet removal.

Incentive delivery

Finally, analysis of the delivery of incentives can be a method of identifying cheaters. Although online gift certificates are a very popular way of delivering a per-complete reward, every third or fourth incentive payment should be made by check or printed notice mailed to a physical address. (Even online gift certificate notices can be sent by mail.) This way, if people want their reward, they have to drop any aliases or geographic pretext in order for delivery to be completed, and oftentimes you can catch cheaters prior to distribution.

By scanning for similar names and derivatives within a specific zip code, otherwise hard-to-detect cheaters can be smoked out. But tech-savvy cheaters also know that slight derivatives, including unusual capitalization, small misspellings, use of initials, etc., are hard for some systems to detect and still will be honored by most banks, (e.g., Richard Smith, R. Smith, Dick Smith, Richerd Smith, RiCHard SmiTH, etc.).

Even if you use online gift certificates, your provider may be able to track the IP addresses from which the certificates were fulfilled. Because most award certificates are not linked to the e-mail address to which they were originally sent, some cheaters just put them together and cash them in from some single address.

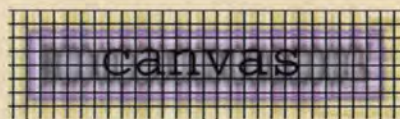
Combining both of these pieces of information, you can work with your gift provider to detect cheaters, albeit, unfortunately after the fact.

Catch the liars

In summary, cheating is still very much alive in all forms of surveying, but in the online world, underlying pattern-matching, logic detection and data mining tools are eliminating the vast majority of behavioral outliers, or outright liars, as the case may be.

(And if anyone is counting down, this article will probably appear on some “How to Cheat at Web Surveys for Fun and Profit” site in 4, 3, 2, 1...) | Q

Which of the following handshake images would you guess can already be read by UC Berkeley’s image recognition bots?



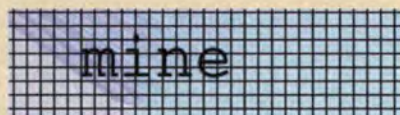
Yes



Yes



No



Yes



Yes



No

Visit www.cs.berkeley.edu/~mori/gimpy/gimpy.html to see many more images that CAPTCHA/Gimpy can recognize.

The second way that pattern recognition looks for cheaters is by applying convergent and divergent validity tests within the survey. In short, similar questions should be answered in a similar fashion and polar opposites should receive inverse reactions. For example, if someone strongly agrees that a product concept “is expensive,” they should not also strongly agree that the same item “is inexpensive.” In these cases, it may be acceptable to tip our hand prior to terminating the interview by saying “Please check your answers to this last section of questions. Some of your answers seem to be contradictory.” But if the inconsistencies remain, the interview should be scrapped and the respon-



Too much open-end data from your last Internet or CATI study?

ADAPT Can Help!

ADAPT has designed a proprietary on-line coding system specifically for Internet and CATI produced comments.

This state-of-the-art system works at twice the speed of traditional coding methods. By coupling this speed with our 20 experienced professional coders, we can get you the data you need fast.

Our service offering:

- 1) Survey Printing and mail distribution
- 2) Returns management for follow-up mailings to non-responders
- 3) Return Mail Handling
- 4) Survey check-in and editing
- 5) Comment coding and verbatim transcription
- 6) Data Entry
- 7) State-of-the-art Character Recognition Scanning
- 8) Tabulation
- 9) Audio tape transcription

Get your survey processed by Market Research Professionals.

Contact: Dave Koch

1-888-52ADAPT

dkoch@adaptdata.com

ADAPT Inc.

5610 Rowland Road, Suite 160
Minnetonka, MN 55343



MindField

internet panels

Connecting you with your audience.

Programming | Reporting | Hosting | Mail to Web
Phone to Web | Web and CATI Combination
Consumer and Professional Panels

Crossing a treacherous landscape

Web surveys have fulfilled their promise as a fast, cost-effective option for many researchers. Unfortunately, just as telemarketing has impacted telephone surveying, one of the most effective ways of driving respondents to online surveys is being hindered by the proliferation of spam. If you're currently sending e-mails to potential respondents, you need to stay abreast of legal, technological, and cultural hurdles - all of which are rapidly evolving.

So we're all on the same page, here are a few key definitions:

Bulk e-mail: This refers to any e-mail sent to a large number of respondents.

UCE: A flavor of bulk e-mail formally known as unsolicited commercial e-mail, and more commonly known as spam.

Opt-out: When list members take action to refuse contact, such as marking a box to say they decline e-mails, or unmarking a box which defaulted to signing them up.

Opt-in: Lists where the members take action to join the list. "Double opt-in" refers to a two stage sign-up process, where respondents reply to a confirmation e-mail (preventing third-party sign-ups).

Legal issues

Spam legislation makes the news periodically, but is only half of the legal tangle. In addition to federal, state and international legislation, you need to keep tabs on the contracts your organization has with service providers.

In January 2004 the federal CAN-SPAM law went into effect, which is both good and bad news for researchers. The good news is

that it superseded an array of state laws, simplifying the domestic legal landscape. The bad news is it's less restrictive than many of those state laws - though that could be considered a neutral factor as most experts do not expect legislation to fix the spam problem. (If you think the general spam problem is not an issue for you, keep reading.)


The most severe penalties in anti-spam legislation are still reserved for behavior in which no researcher should ever engage. Two of the most common acts are falsifying the "from" addresses or ID of the



By Ann Ray

Best practices for e-mail surveys and mailing lists

Editor's note: Ann Ray is vice president of operations at Apian Software, Seattle. She can be reached at aray@apian.com or at 206-547-5321 x 7114.



Remember When They Answered?

Life before Answering Machines, Cell Phones, Call Screening, Do Not Call, Caller ID, Privacy Groups, Telephone Legislation. Remember?

Today, while we are faced with significant challenges in completing a telephone study, the benefit of speaking directly with a person and engaging them in a dialogue that can be probed and better understood is still critical.

At Survey Service, we believe in the art of skilled telephone interviewing and bringing the benefit to our clients - no matter what challenges lie ahead.

They Still Answer. You Just Need The Right Connection.

**Survey
Service**

Marketing Research • Information Services

For Assistance on Your Next Project Call:

800.507.7969

www.surveyservice.com

**Business-To-Business • Consumer
Customer Satisfaction • Pharmaceutical • Health Care**

sending server (also known as spoofing), and routing messages through third-party mail servers – tactics both used by spammers to hide message origins. Other prohibited activities include harvesting e-mail addresses from Web sites (just as search engines index page content) and generating random e-mail addresses (such as sending to “info@” every domain registered). Laws also prohibit misleading sub-

ject lines, so while a teaser subject may sound like a good idea, it's better to use something descriptive of your project.

Beyond these restrictions, the legal issues are less clear, particularly for survey research. Traditionally, surveys have been considered non-commercial, and have been exempted from telemarketing legislation. While anti-spam laws generally do not address surveys, they do tend to refer to commercial mailings rather than generic bulk mailings. However, where do you draw the line? Is an invitation to join a paid panel commercial or not?

In addition to anti-spam legislation, you need to be aware of how privacy law ties in to e-mails. Privacy law kicks in when you're collecting “personally identifiable information” such as a name, address, customer ID or e-mail address. Right now, the U.S. has irregular privacy coverage, with well-defined protection related to children, health care and financial services (the European Union has more stringent legislation). You'll need to check the legislation to see what applies to your surveys, and stay abreast of new developments (see the list of resources at the end of the article).

When you use e-mails to reach respondents, it is possible for an otherwise anonymous survey to indirectly collect personally identifiable information. This happens when the respondents are e-mailed unique passwords or URLs that they use to access the survey. Now a link exists between the anonymous questionnaire and an e-mail address. So, if you're surveying in an arena covered by privacy law, just be sure you comply with the applicable legislation. This is also an area where a third party may be helpful, by removing that identity link before you receive the data.

While legislation has made significant strides recently, many of the clauses are just catching up to contracts that service providers have

been using for years. The Internet service providers (ISPs) you use – both to connect your mail server to the Internet and to host your Web server – have “acceptable use” policies to which you agreed on sign-up. Unlike anti-spam legislation, these policies tend to address any bulk e-mailing, not just commercial mailings. And while there is a (small) chance that someone may take you to court over a legal violation of privacy or spam law, an ISP has the painful and immediate recourse of pulling the plug.

Technological barriers

Warren Buffett once said, “It takes 20 years to build a reputation and five minutes to ruin it. If you think about that, you'll do things differently.” ISPs practice real-time monitoring of their servers, so it may take less than five minutes for you to ruin your domain's reputation. Spam makes up approximately 50 percent of mail server traffic, and to stem the tide, large mail providers such as AOL, Earthlink, MSN, Yahoo, and Hotmail are continuously tuning their filtering software.

Spammers tend to be indiscriminate in their mailings, sending to thousands (or sometimes millions) of addresses at once, looking for the fraction of a percentage that will buy. Because spammers don't bear the full cost of these mailings, it's more economical for them to send 10,000 extra messages, rather than clean the bad addresses from their lists. Therefore, ISPs monitor real-time for both large inbound mailings and also for mailings generating a significant number of bounces (messages returned due to invalid addresses). In some cases, those real-time red flags can be enough to get you blacklisted.

Blacklists are collections of e-mail addresses, domains, or IP addresses (the numeric value underneath a domain) for which any communication will be rejected. To reach a potential respondent, your message may have to clear several blacklists

Your One-Stop Shop for Online Research Solutions

iResearchSM, MRSI's comprehensive line of Web-based marketing research products, provides you quick, cost-effective solutions for your online research needs.

We have online experience in a number of areas including:

- Product Testing
- Concept Testing
- Market Profiling
- Competitive Benchmarking
- Tracking Research
- Advertising Testing
- Customer Satisfaction
- Web Site Surveys

We ensure secure, high quality results while managing your entire project in-house, from custom research design and data collection to final analysis and recommendations. MRSI has full access to major online panels, can build you a custom panel or utilize your existing e-mail list.

MRSI's online research experience spans many industries including consumer packaged goods, business-to-business, pharmaceutical, consumer services and financial. As a leader in research technology and innovation since 1973, our full-service firm provides a powerful array of both online and offline solutions.

Contact MRSI today for comprehensive research solutions tailored to fit your individual needs.

MRSI[®]
MARKETING RESEARCH SERVICES, INC.
identifying OPPORTUNITY through custom research

513-579-1555
800-SAY-MRSI

info@mrsi.com
www.mrsi.com

at the ISP, corporate and desktop levels. While many blacklists take an "innocent until proven guilty" stance, some have neither notification nor appeals processes. A handful of lists take pre-emptive strikes, declaring certain ISPs "spamhauses" and blocking that service provider's entire range of IP addresses - a practice which naturally includes a large number of innocent domains.

ISPs, companies and individuals use content screening software to filter the e-mails that make it past blacklists. These filters look in the subject line and message body for specific phrases, or compute a score of dubious elements for each message. If you think your invitations won't trip a content filter, here are two increasingly typical examples:

- An invitation with the subject "Tell us what you think" was rejected because an individual was blocking ink and toner cartridge spam.

- A corporate filter rejected several invitations because they included unsubscribe information in the footer.

Two final elements that may result in messages being blocked are improper reverse DNS and open relays. Both attributes relate to ways spammers try to obscure message origins.

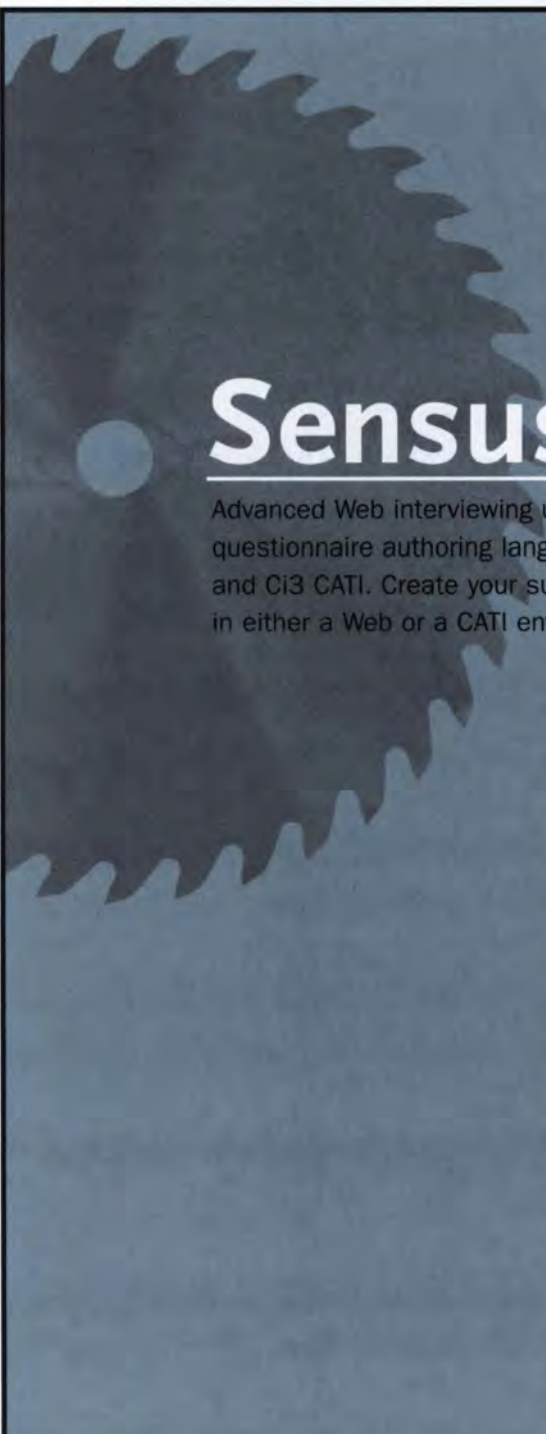
The value underlying a domain name is an IP address such as 65.61.185.49. This is the server identifier used to route messages and URLs around the Internet. Forward DNS lets servers look up an IP based on a domain name, while reverse DNS allows systems to look up the domain when they have an IP address. Messages where the forward and reverse DNS are not mirror images are more likely to be spam, adding to your message's "score" or prompting rejection in and of itself. In some cases you can't achieve an exact mirror (a single mail server may send mail for several domains), but at the least you want the reverse DNS to exist, and to be a domain with a clean spam record.

Open relays are mail servers which allow third parties to forward mail through their system, in the process stamping that mail server's information on each message they route. If you're sending mail from a server with an open relay, many systems will block your communications.

When messages are blocked or flagged, the screening software will take one or more of these actions:

confirmation, bulk mail folder, bounce, black hole, or abuse reporting.

- Confirmation - A reply is sent to the message sender asking them to confirm their e-mail was not spam. As spammers generally do not monitor replies, this is a very effective screen. Once you confirm (either by replying or via a form), the message is released from quarantine and sent to the addressee.



SensusWeb

Advanced Web interviewing using the same questionnaire authoring language as WinCati and Ci3 CATI. Create your survey once and use it in either a Web or a CATI environment — or both.

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

Plus, we now offer Web hosting and deployment services.

Sawtooth Technologies Best Practices. Best Value.

www.sawtooth.com
(847)239.7300

PERCEPTION STUDIES

Perception Studies June 2004

CRI



Michael Mallett, CEO
Corporate Research
International

419-422-3196

Every month, Corporate Research International will be conducting free market research studies for random companies and posting the results in Quirk's magazine. *The April issue highlighted a study on the perceptions of customers watching their carbohydrate intake requested by Papa Johns International and Hardee's Food Systems, Inc.* An instant survey tool was used to focus on income ranges, diet plans, and menu preferences. *The May issue incorporated a study done for a National Multi-Family REIT about the effectiveness of incentives and amenities on occupancy rates.* Approximately 5000 CRI auditors nationwide were utilized to compile the data based on rental ranges and regions. The full interactive studies are available at www.mysteryshops.com/quirks.

Tapping into the PERCEPTIONS & EXPECTATIONS of your CUSTOMERS

These two studies employed only a sampling of Corporate Research International's available evaluation tools. The type of questions for each project determine which tools will be used. As with any market research study, the primary

objective is to understand the expectations of the consumer. Perception data is used to more effectively meet those expectations. That data can be gathered and analyzed in several ways:

Mystery Shops

Trained field representatives (Auditors) are potential customers sent to observe on-site product and service delivery. Perceptions are evaluated and released to clients within one business day.

Interactive Voice Response

IVR is a telephone based survey tool by which customers dial an 800 number to answer a short survey. Incentive rewards and product discounts encourage this form of feedback.

Interactive Web Response

IWR is much the same as IVR, but utilizes internet responses. Both are completely customizable to manipulate raw data to produce trend analysis and geographic comparisons.

Online Focus Groups and Web surveys

Raw Data is compiled via the internet into instant shopping reports and real time ad hoc, graphing and charting. In-house programmers insure fast changes to custom designed programs.

Instant Surveys

A questionnaire is created and released to select demographics worldwide to compile statistically significant data in less than one day.

MP3 Phone Shops

Clients can listen to electronically transmitted recordings of actual phone shops while reading the onsite report

With such extensive knowledge about your customers expectations and experiences, your business can maintain a competitive edge in an ever demanding marketplace. Corporate Research International provides timely, accurate evaluations 24 hours a day empowering you to identify your strengths and weaknesses. Knowledge is power. What do you want to know?

Contact Michael Mallett to have a
Free Market Research Study
performed for the next issue of *Quirk's*.

Next month's Quirk's will focus on internet research methods.

mysteryshops.com



A WORLD OF INFORMATION

Mystery Shopping

IVR / Interactive Voice Response

IWR / Interactive Web Response

Online Focus Groups

Web Surveys

Instant Surveys

MP3 Phone Shops

perception

EVALUATION

CORPORATE RESEARCH™
INTERNATIONAL
MYSTERYSHOPS.COM

- Bulk mail folders - These are primarily used for dubious messages, routing potential spam into a specialized folder from which the recipient can check (or ignore) e-mails at their leisure.

- Bounces - Contrary to common perception, bounces are a good thing. While the language is often obscure, you can usually discover why your messages are being blocked, such as improper reverse DNS. If the problem is the ever-common "user unknown" error, then you have the opportunity to clean your list, reducing bounces on future mailings.

- Black holes - More and more frequently, spam filters will simply trash messages, never notifying either the sender or recipient that a message was discarded.

- Abuse reporting - Some software will send a rejection notice not just back to the sender, but also to the administrator of that e-mail's domain and to the ISP hosting it.

The two commonly used addresses are abuse@yourdomain.com and postmaster@yourdomain.com. Be sure someone in your company is both monitoring these addresses and promptly resolving any complaints.

Cultural shifts

At this point there is a lot of venom directed towards spamming. While a few people have inboxes blessedly free of spam, others are deluged with a combination of time-consuming quantity and extremely offensive content. What this boils down to is quite simple: If the recipient does not recall specifically requesting a message, it is spam.

When you ask people to complete a survey, you are asking them to do you a favor. Don't think that an offer of payment or a prize changes that - if they didn't want to receive the original message, then offering compensation just makes the e-mail look more like spam.

For market research, this can cre-

ate challenges. You may have a great opt-in e-mail customer list, perfect for your study about new products or purchasing decisions. However, to use that list, you need to indicate who provided it, possibly biasing responses. So if company anonymity is critical, you may need to resort to postal invitations to your Web survey.

Recommendations

1. Begin to educate yourself, your clients and your organization about e-mail issues. People have radically different understandings of the issues, so it's best to make sure everyone is using the same definitions for terms such as opt-in.

2. Set e-mail policies for your firm and stick to them. This can be very difficult, especially when it translates to losing a client to a less diligent competitor. Remember that your careful e-mail practices and clean record help ensure that the messages you do agree to send will

From
Here...

To
Here.

Our name is the future...

From being one of the first companies to fully automate, to applying 18 years of telephone market research experience to today's and tomorrow's internet world.

The On-Line Advantage

- Real Time Reporting • Secured Client Access Portal
- Custom Programming • Advanced Survey Logic
- Virtually all data export formats
- Detail oriented, team approach

The most trusted name in data collection

Your project receives complete 24/7, hands-on attention from some of the industry's most trusted experts. Call Peggy O'Connor, Nancy Hayslett, Frank Markowitz, Ed Sugar or Arne Colberg today.

800-765-3200
www.on-linecom.com



ON-LINE COMMUNICATIONS

Information you need, people you trust.

Survey Sampling. SurveySpot.

Many breeds...only one SurveySpot



Sampling is SSI's only business, which has allowed us to develop unparalleled expertise. Since 1977, SSI has continually developed new sampling techniques, to insure that our clients receive the most precise and cost-efficient approaches to data collection available.



SurveySpot – SSI's Internet panel used exclusively for marketing research – enables researchers to control online research. SurveySpot delivers higher response rates and panelists can be selected based on demographics. SSI's eSamples help to complete Internet surveys in record time at low, low cost per interview.

SSI's sampling team of experts will help determine the best sampling methodology and provide the best quality sample in a timely fashion. *Survey Sampling – the source for all your sampling needs since 1977.*

- ▲ eSamples for Internet Research (SurveySpot)
- ▲ Global Samples (18 countries)
- ▲ Random Digit Samples
- ▲ Targeted Samples
- ▲ Business-to-Business Samples
- ▲ SSI-SNAP Online Sample Ordering System
- ▲ Data Enhancement Services

y e s t e r d a y ... t o d a y ... t o m o r r o w ...



continue to reach respondents. It helps to publish your policies on your Web site, both for clients and for anyone investigating spam complaints.

3. Begin building clean opt-in lists now. All it takes is a simple message inviting your customers, contacts or panelists to join your new opt-in list. Be clear about the list purpose,

and do not include additional marketing material in the mailing – just the subscription information. Also, while opt-in invitations are inoffensive (assuming the recipient has some relationship with you), those about opting out of future mailings tend to irritate people. Try to phase out any current opt-out lists, preferably before the government man-

dates it. Also, remember that signing up for a list is an exchange – you need to offer value in return for their permission. Be sure to keep the sign-up language open enough to send a variety of communications, i.e., “news mailings” is much better than “our newsletter.”

4. Always include unsubscribe information in your mailings. If the mailing is apart from the typical communication, it’s also helpful to say something like “Because you signed up for Acme news, we’re sending you this survey invitation.”

5. Pursue whitelists, the approved sender counterpart to blacklists. Some large ISPs maintain lists, and you should also ask individual members to add you to their personal filters. For the latter, it helps to use a consistent “from” address, so whitelisting

“news@yourdomain.com” will let all your bulk messages through.

6. Create list management systems, with audit trails when people subscribe or unsubscribe. Ideally, list members should be able to manage their own subscription information and status. If you ask people to sign up while on the phone, you may want to use the double opt-in approach and send a confirming e-mail.

7. Check policies and references for any firm from which you rent opt-in lists, or to whom you provide your lists for drops. Ideally you want someone with the same philosophy toward customer contact as your firm. | Q

Resources

Note: For a few of these you really want to get the domain extension (.com/.net) right.

- www.cauce.org - an anti-spam organization
- www.spamlaws.com - a listing of state, federal and international legislation
- www.spamcop.net - a moderate spam reporting/filtering site
- www.spews.org - an extremist spam reporting/filtering site
- www.ftc.gov - an official U.S. site, particularly useful for privacy law
- www.export.gov/safeharbor/ - resources for understanding EU privacy laws
- www.ordb.org - test for open relays
- www.samspade.org - DNS and IP lookups
- www.webopedia.com - general dictionary/reference



Socratic builds private online research panels...

What if you threw a survey and nobody showed up?

Socratic Technologies has years of experience developing and managing custom online panels.

- **Proprietary panels** create a real-time communication channel between you and your customers, while streamlining the research process
- **Shared panels** let you divide panel costs with other clients, while providing you with research credits you can use to conduct online research studies
- **Revenue panels** turn your Web site traffic and/or customer base into a revenue stream, as our clients turn to your panelists for answers to their market research questions

Find more information under “Panel Development” at our Web site
www.sotech.com.



Advanced Conjoint/Choice Capabilities

Over the years, Sawtooth Software has increased in sophistication. Perhaps it's time you evaluated our tools. You may be surprised by the possibilities.

HB (Hierarchical Bayes)

- Individual-level estimation for CBC, ACA, traditional conjoint, and general regression-based problems.
- No need to use our data collection products—supply your own data!
- Advanced features: monotonicity and sign constraints, control prior variances, covariances, and degrees of freedom.

CBC (Discrete Choice)

- Web-based, paper-based, or Windows-based interviewing. Logit, HB, or Latent Class estimation.
- Full-profile, partial-profile, alternative-specific, or “store shelf display.”
- Up to 30 attributes, 100 levels per attribute, and 100 concepts per task.

Experimental Design for Traditional Conjoint and MaxDiff Scaling

- Traditional conjoint (CVA): excellent experimental plan designer for one- or two-concept at a time cards.
- MaxDiff (Best/Worst) designer: specify the number of items, items per set, and number of sets.

Product Optimization Searches within Conjoint Simulator

- Search for optimal products based on utility, share, revenue, or profit.
- Techniques include hill-climbing and genetic algorithms. Use our conjoint programs, or supply your own data.



Sawtooth Software, Inc.

530 West Fir Street • Sequim, WA
p: 360/681-2300 f: 360/681-2400
www.sawtoothsoftware.com

Visit our website for
free technical papers
and demos, or call
for more information.

**Coding Web Interviewing
Multilingual Interviewing
Automotive Clinics Recruiting
CATI Pre-recruits
Web Usability Labs Taste Tests
Focus Groups
Phone-Internet Interviewing
Data Processing
Internet Reporting
Internet and Handheld CAPI**

Overwhelmed by research choices?

Davis Research has the knowledge and experience to guide you through today's research technology.

With so many research options available, it can be difficult to choose the method that's right for your project. Since 1970, Davis Research has been at the cutting edge of research technology. Our team of technology experts provides a combination of traditional data collection services and innovative techniques, plus the experience to know which is appropriate for your project. The combination of our web-enabled interviewing stations, nightly Internet reporting, web-based interviewing, technology ready focus rooms, and handheld data collection services with our experienced Call Center staff, project managers, data processing staff and on-site tech support means that Davis Research is prepared to handle even your most complex projects. Trust Davis Research for the best in traditional and technological market research.



23801 Calabasas Road
Calabasas, CA 91302
800.366.2408
www.davisresearch.com
info@davisresearch.com

Organize to maximize

The computer is finally sitting idle, the videographer is packing up the gear, your Web site usability interviews are completed, and now it's time to write the report. The interviews brought out such a wealth of information - where do you begin?

As with any qualitative project, the starting point for your report begins before you sit down at the computer. A thorough debrief with your clients is critical to writing a report that will be insightful and actionable.

Before beginning Web site usability interviews, provide clients with a set of screen shots showing the screens of the Web site the user will encounter in their likely chronological order. Encourage clients to use these screen shots as the basis for their note-taking while watching the interviews. It is easy to point to or circle elements in the screen shots that are relevant to the client's observations.

The debrief process is then simply a matter of going through these screen shots one at a time, and collecting all of the clients' notes relevant to that page. In the process of working through the screen shots, client opinions about strategic issues, various possible fixes and the ease of implementing the various fixes will naturally be discussed. These discussions will help you understand the client's situation, so you can make your report recommendations relevant and actionable. Using screen shots as a framework for the debrief also helps keep the conversation on track and focused. No matter how tired you are at the end of a day of interviews, take the time to do a thorough debrief.

After you've met with the client, take some time - you may need less than an hour - to summarize the key findings of each debrief session. Pay particular attention to problems

that occurred throughout the tests, and draw some preliminary conclusions about their implications. Your goal is to capture the findings and insights from the research while they are fresh in everyone's minds.

The report - organizing your findings

You have finished the interviews, conducted daily debrief sessions and have notes, screen shots and questionnaires piled in front of you. You also have a deadline for a topline or draft report bearing down on you. So naturally your first inclination is to jump on your computer and start typing, right? Wrong!



By Mike Elledge
and Nancy Levy

Reporting Web site usability results

Editor's note: Mike Elledge is a software accessibility/usability consultant for the University of Michigan, Ann Arbor, Mich. He can be reached at melledge@umich.edu. Nancy Levy is a senior project director and moderator at Gongs and Associates, a Bloomfield, Hills, Mich., research firm. She can be reached at nlevy@gongs.com or at 734-453-3346.



The whole world in real-time.

Net-MR™ from GMI is the only integrated, real-time software solution for global market research. Web, wireless, CATI, CAPI, all the data you collect from around the globe can flow into one database. You can author, manage, analyze or create reports anytime, anywhere.

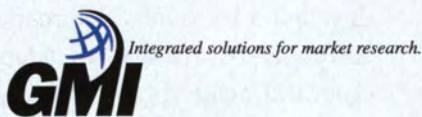
Net-MR is scalable, flexible and fully customizable. Could you use those words to describe your current market research system?

Concerned about migration from existing systems? Don't worry, we support more data formats than any software, so importing data from your legacy system will be easy.

With our net-centric platform, one of the world's largest online managed panels, and a talented 24x7 Service Bureau, it's not surprising that *13 of the world's top 25 research firms are already GMI clients.*

Whether you're doing single-country *ad hoc* surveys, or continuous global tracking studies, GMI brings the world to you.

Ask about our "Trade In, Trade Up" promotion.



www.gmi-mr.com
infoQ@gmi-mr.com
206.315.9300

Ignore (for the moment!) all that pressure to get the report written. Now is the time to go back to your research objectives and protocol.

Why do you want to do that? Two reasons. The first is that you need to revisit the context for doing the research. What were the questions you wanted to answer? What were your hypotheses about the findings? Going back to the beginning will help you frame the data you have collected, and ensure that, first and foremost, the client has answers to the questions that were posed.

Second, you need to organize the data you have collected so you can present it in a thorough and coherent way. Those insights and first impressions from the debrief session are valuable, but they need to be grounded in the hard data of the research.

Putting it together

One of the most valuable, and yes, we admit, tedious, parts of the reporting process is putting all that

information together. Create a spreadsheet that combines typical usability categories like navigation, labeling and content with task completion and timing (if it is part of your test) information. It is helpful to include any other data you collect from the user, such as task ratings for difficulty or written comments.

Take that category information and lay it across your spreadsheet as headings. Then, put each subject and task along the left-hand side to create a grid. Go back to your notes and plug in the information you have collected. As you fill it in, remember to categorize problems according to the usability issue. If someone has difficulty completing a task because none of the headings made sense, it is a labeling issue. If they couldn't find the information they needed because it wasn't on the page they expected, it is a content issue. If it took them forever to complete a task because they traipsed all over the Web site to find it, it's a navigation problem.

Since many usability problems

stem from multiple issues, this can be a little tricky. What is important, however, is not that you choose the correct label for the problem every time, but that you are consistent in how you categorize them. You can always go back and move data around if need be. Don't get too hung up on perfection!

Once you have completed the grid, you should have a rough history of each test. You can go back to that first subject and relive their experience. Suddenly, you will find, those early notes and insights from the debrief will come alive - and be placed in their proper context.

There are several other benefits to this approach. Because you have the data before you in a spreadsheet, you are free to sort it in a variety of ways. Organize the data according to task. Is there a pattern of usability problems among the users? Sort it according to usability issue. What comes up most often? Do most of the problems in the site relate to navigation? Then maybe the client

Open your eyes

to a revolutionary
qualitative research tool.



If you've been looking for a way to maximise your time and optimize your qualitative data analysis, the answer is in sight.

XSight is the most exciting breakthrough tool ever developed for qualitative market researchers. This customized software can adapt to your working style and assist you to shape your findings more effectively and efficiently.

Your intuition.
Our software.

The logo for XSight, featuring the word "xsight" in a bold, lowercase, sans-serif font. The "x" is white and set within a white circular outline. The "sight" part is dark blue. The background is a solid green color.

XSight. Xplore. See the future.

Sample XSight at www.qsrinternational.com

Know. Now.

Obtain concept testing results in less than 24 hours—from expert market researchers you can trust.



Reach the only people who can tell you if your latest idea is your next best product.

Only InsightExpress® can deliver concept screening, testing, and attitude & opinion research you need in 24 hours from need identification to results delivery. Our unique recruitment methodology provides leading CPG firms with access to more than 100 million individuals.

InsightExpress' patented and award winning solutions empower you to make the right business decisions about your ideas in real-time. It's concept testing without breaking your budget, at a speed that won't impact your momentum.

Leading consumer package companies turn to InsightExpress' market research expertise for all of their research needs. See why by calling InsightExpress' research experts at 877-329-1552.

Visit www.insightexpress.com/concepttest to learn more about InsightExpress and for a white paper detailing how to successfully migrate traditional testing online.

insightexpress 
Research for the Right Decision®

877-329-1552 • info@insightexpress.com
www.insightexpress.com

should revisit the site architecture. Are the problems related to labeling? Then the client needs to better understand the language of his customers.

This data, qualitative as it is, can also enhance your credibility with the client, and, just as important, the internal clients. You can say, for example, as we did in a recent evaluation of a proposed interface for a library catalogue system, that four of five users preferred a dropdown menu to list of choices. Or, also in the case of this evaluation, that four of five disliked the labeling for a hotlink to bibliographic information. Since we had asked them why they disliked the label, and for suggestions for label names that would make more sense, we could recommend better alternatives.

You also have a flexible document that you can give to the client, should they want to play with the data.

The report - where to begin

Web site usability studies often provide a surprising amount of information. You may find that putting the information into a spreadsheet by task and issue (navigation, labeling and content) will help you identify recurring problems, and give you insights into the Web site as a whole. It may also help you convince the client of the need for changes, as well as the validity of your observations, if you can report that “seven out of 10” users experienced the same or similar difficulty.

Another common occurrence in Web site usability testing is that larger, strategic issues are often revealed along with the more task-oriented, tactical issues the study was designed to explore.

For example, we recently studied a Web site used by a company’s employees to search an archive of past marketing research reports and tracking studies. Web site designers had structured the information by type of research, expecting that users would search based on this premise.

Our usability tests revealed that respondents actually wanted to search by product. In fact, we found that the original premise on which the Web site had been built was confusing and very frustrating for users. Though the usability tests had been undertaken simply to help designers tweak some parts of the Web site and provide a “sense check” for some operations, this overall, strategic issue was clearly revealed. We have found on nearly every study we’ve conducted that such strategic issues usually do emerge.

When these issues are discovered, they should be introduced at the beginning of the report with tactical issues following. Although these strategic findings may not strictly match the objectives of the study, they are generally too important to be buried at the end.

After strategic issues have been addressed, it is important to prioritize the more tactical findings according to their impact on the strategy of the product or service being promoted. This is also (not surprisingly) the order in which the client should address these issues. Nonetheless, it is important to ensure that your findings directly answer the client’s objectives for the study so be sure to include them as well.

It is often tempting to report findings in the order in which they occur on the Web site. For example, in a recent study, respondents 1) registered at a Web site, 2) shopped for a product, then, 3) sought help if it was needed. The most important finding, however, occurred on the second or shopping page, where product descriptions misled respondents about their purchases. Although shopping followed registration in the sequence of using the site, we reported the findings on the shopping page first, as they had more impact on the site’s overall usability.

The screen shots created for client note-taking can also be used as the backbone of your report. Incorporating screenshots makes it

much easier to explain the positive and negative aspects of a particular Web site area and suggest appropriate improvements. In addition to incorporating complete single-screen pictures, it is also useful to use details of screens when necessary or show multiple screens to illustrate how users move through a process.

As you report the findings, remember to focus on usability and not on programming. Avoid the temptation to describe technological or programming solutions, since that is the responsibility of the Web site designer. Moreover, don’t shy away from describing the ideal solution from the user’s standpoint – even if it appears technologically challenging. Your role is to describe how the Web site should function. Leave implementation to the Web site designers and programmers.

Include recommendations for improvements along with an explanation of the problem on a single page. Clients find it helpful to see the relevant Web page, a description of its problems (or positive aspects), and recommendations for their solution in one place. It is easier to understand the recommendations if they are shown in the context of the Web site, rather than grouped together at the end of the report.

Sum it up

After creating the body of the report, provide an executive summary for department heads and others not directly involved in the nitty-gritty of the Web site. Begin your executive summary with an overview of the key issues, describe their implications, then give the related recommendations.

Web site usability testing is an effective, insightful research method that can provide much-needed feedback from real site users. By following the above suggestions, you will provide your client with a report that is actionable, understandable and filled with information to make their Web site more valuable to its users. | Q

Advanced Internet Research Technology



online

The Internet is a complex and constantly changing environment. We invest heavily in software, systems and staff to stay abreast of changes and to ensure consistent high quality research year after year. Our Internet research technology includes:

■ **XML and SQL Programming**

Large, complex database structures can be created, managed, and integrated with other data.

■ **Advanced Online Reporting**

Online topline as the data comes in, 24 hours a day. Complex online reporting systems for large, ongoing surveys.

■ **Icion™**

Proprietary multivariate sampling software that simultaneously balances our panel samples by geography, age, gender, etc., and compensates for each group's predicted response bias.

■ **Logician™**

Proprietary questionnaire programming software with the advanced logic and flexibility to handle the most complex surveys.

We have over 3,500,000 consumers in our suite of worldwide Internet panels ready to execute your next research project.

Let us help you improve your marketing research systems.

Call 1-817-640-6166 or visit:
www.decisionanalyst.com



Decision Analyst

The global leader in analytical research systems

Get free STATSTM statistical software at
www.decisionanalyst.com/download.asp

What's my motivation?

Research professionals have a common interest in truly understanding research respondents. We have a shared goal in respecting, protecting and creating goodwill among the survey respondent base. One of the interesting things about an Internet sample panel is that, by its very nature, a panel encourages two-way communication. Survey Sampling International (SSI), as part of its panel management practices, has an ongoing commitment to understand and respond to panelists' likes, dislikes, frustrations and motivations.

While the reactions of panelists to different offers and opportunities are varied, patterns emerge in the Internet survey experience. Research with panelists provides insight into the format, presentation and style elements that garner the highest-quality results. This article deals with understanding the behavior of Internet panel respondents and the factors that combine to create a successful interview experience for both respondents and researchers.

Motivations for joining an Internet research panel

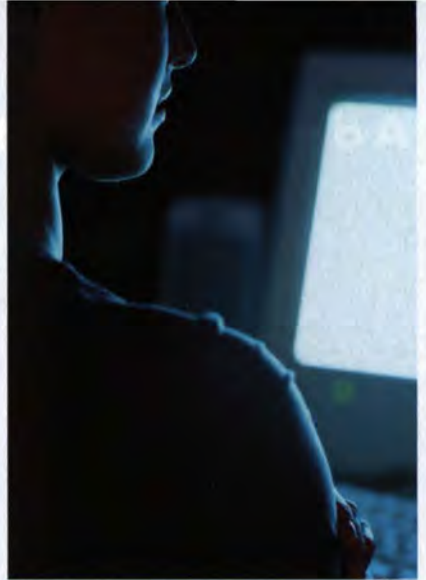
Press the lever, get a banana. Press the lever again, get another banana. This characterizes the way some people view panelist motivations and reward systems. But is it really an accurate view of what motivates panelists?

In April 2004, 6,000 SurveySpot panelists responded to one or more panel management surveys. These surveys were administered by SSI to measure satisfaction with the panelist experience and to help provide additional metrics for managing the SurveySpot panel most effectively. One of the questions SSI asked was:

“What is the primary reason you joined SurveySpot?”

- 22 percent said to influence decisions and the designs of products and services.
- 26 percent said they like to share their opinions with others.
- 47 percent said it was the opportunity to make some money while giving their opinion.
- 2 percent fell into the “other” camp.
- 3 percent were not sure.

Almost half of all panelists said they were intrinsically motivated to



By Christopher De Angelis

Panelists talk about their online survey experiences

Editor's note: Christopher De Angelis is vice president of sales at Survey Sampling International, Fairfield, Conn. He can be reached at chris_deangelis@surveysampling.com or at 203-255-4200 ext. 330.

What do more than
1500 of the leading
Market Research
companies have
in common?

They use
The Analytical
Group's Software!

WinCross - Crosstabulation
WinQuery - CATI/CAPI/WEB

Thank you

for making The Analytical Group's
software the most widely used data collection/tabulation
software designed especially for the marketing research community.



The Analytical Group, Inc.
800.946.2767
www.analyticalgroup.com



join a panel and share their opinions. Panel members respond positively to the opportunity to see how their opinions relate to the opinions of others. Not only is this feedback conducive to increased participation, it's less costly than direct incentives. However, this motivation is a fragile thing, and can be easily damaged if trust is broken as a result of lengthy surveys, technical problems or other factors that burden the respondent.

Motivations for taking a survey

SurveySpot panelists provided feedback on their experiences and motivations:

"What is the most important factor in determining if you will take a SurveySpot survey?"

- 23 percent said an interesting topic.
- 22 percent said an invitation received at a convenient time.
- 21 percent said the prize or reward offered.
- 18 percent said the length of the survey.

- 7 percent were not sure.
- 8 percent said "other."

Topic and convenience, not surprisingly, were among the most important factors. This is consistent with the findings of other research studies such as the 2003 CMOR Respondent Cooperation and Image study. The influence of prizes or rewards was a top choice, but not a stronger influence than either convenience or interest in topic. Almost one in five said survey length was of importance in deciding to take a survey.

"In your opinion, what is the ideal survey length?"

- 2 percent said less than two minutes.
- 21 percent said two to five minutes.
- 44 percent said six to 10 minutes.
- 21 percent said 11 to 15 minutes.
- 3 percent said 16 to 25 minutes.
- 0 percent said 26 minutes or more.
- 8 percent said there is no ideal length.

- 1 percent were not sure.

One thing is clear from this and other research SSI has performed on Internet studies: Respondents overwhelmingly prefer short surveys. Fully 88 percent of panelists in our survey indicated a preference for surveys lasting 15 minutes or less. If you have a short survey, state the length in the invitation and this will encourage participation. Invitations for surveys that advertise a "short" or "brief" survey that takes 20-25 minutes generate a lot of panelist frustration. Be honest about the actual length of the survey experience. Respondents are saying, "I want to share my opinion, but I prefer to do it for surveys that are interesting to me, received at a convenient time, and are of a reasonable length."

There are several forces working against longer surveys, including: lack of interest, higher mid-survey abandonment rates, and increased incentive costs. Remember that incentives/rewards were a motivation for joining a panel for less than half of survey respondents, and a factor in responding to a specific survey only about 20 percent of the time.

Further support for the finding that incentives and rewards are not the primary motivation for some panelists is suggested by responses to the following question:

"What is the primary reason you choose NOT to take part in a SurveySpot survey?"

- 35 percent said it was an inconvenient time.
- 6 percent said the subject was not interesting.
- 25 percent had trouble accessing the survey.
- 2 percent said the instructions were confusing.
- 16 percent said the survey length.
- 9 percent said "other."
- 7 percent were not sure.

The fact that 25 percent of respondents indicated they had trouble accessing a survey suggests that there is work to be done to make the survey experience smoother for willing respondents. Increasing server capacity to accommodate higher volumes

Branded Web Surveys for anyone

We make you look beautiful

Branding is all about credibility. We can help.

We can custom build a branded online survey site for a very reasonable cost that gives you

more credibility and increases your response rate.

It's great for customer, employee or product satisfaction studies, in fact any study where response rate matters.

Call us to learn more or to book your next web based study.



Consumer Opinion Services

We answer to you

2225 Lloyd Center, Portland, Oregon www.cosvc.com 503-493-2870
info@cosvc.com

Qualitative Services ♦ CATI/CAPI ♦ Field Management ♦ Web Surveys

of active panelists with open concurrent sessions would be in the best interest of everyone involved in the research process.

Another view of panelists' motivations for taking surveys is found in the following results from reward testing. SurveySpot uses a \$10,000 monthly prize drawing in which over 100 cash prizes are awarded to panelists every month. The program rewards panelists who complete surveys and those who attempt to complete a survey but do not qualify with entries into the monthly \$10,000 prize drawing.

In this test, the invitation to take the survey stated both the survey length and the incentive being offered. A control and two test cells were randomly selected from across the panel. The objective was to measure click-to-start rates of panelists opening and starting the survey with three promised incentive offers:

- an entry into the \$10,000 monthly prize drawing,
- an entry into the \$10,000 monthly prize drawing plus a \$300 project-specific prize drawing from among all completes, and
- an offer of \$1 for completing the survey.

Click-to-start rates for the \$10,000 prize drawing plus the \$300 project-specific drawing were about 5 percent higher than for the \$10,000 prize drawing alone. Click-to-start rates for the \$1 incentive alone were about 8 percent higher than for the \$10,000 prize drawing alone.

In essence, the needle moves - albeit slightly - when a small project-specific prize drawing or a \$1 incentive is offered. The monthly \$10,000 SurveySpot prize drawing offers the intrinsically motivated panelist and the panelist interested in an opportunity to make some money while sharing opinions reason enough to begin a survey. Research agencies benefit by not needing to shoulder the added costs of incentives for shorter surveys with topics of general interest. Further, panelists themselves remain motivated to take surveys without

requiring an incentive every time.

Panelists matter

The information that flows from respondents provides the insight and direction our clients need for successful, actionable survey research. Respondent needs are simple: Tell it to them straight. Keep surveys less than 15 minutes long. Provide feedback, if possible. Offer an opportunity to be rewarded, and make sure if

you lead respondents into the survey process they can access the survey and make their opinions heard.

Remember that the basic premise of Internet-based research is that it stems from an opt-in willingness of respondents to be part of the process. On the Web, respondents are just one mouse click away from doing something else. It's up to the research professional to ensure they don't exercise that option! | Q

What's important to your customers?
What do your employees think?
What do your members want?

DO YOU KNOW?

Apian SurveyPro 3.0[®]

Comprehensive survey software

- One-time cost
- Flexible licensing
- Control entire survey process in-house
- Web, Paper, and Kiosk options
- Unlimited surveys
- Unlimited respondents
- Polished reports
- Over 11,000 installations worldwide

Apian SurveyHost[®]

Full service Web and PDA surveys

- Experienced design staff
- No software required
- Secure, monitored servers
- Guaranteed project launch dates
- Branding to match your corporate look and feel
- Custom coding on request

TEL (800) 237-4565 x2
WEB www.apian.com
EMAIL sales@apian.com

Apian 
Collective Intelligence

Community involvement

The Internet has become an important part of the marketplace. In addition to purchasing online, millions of consumers regularly use the Internet to gather information in support of purchase decisions.

A key aspect of this information-gathering is participation in online communities. There are online forums for just about any consumer product you can think of, from coffee to consumer electronics. In these forums, consumers discuss their experiences with products and services, provide their opinions and share news and advice.

The use of ethnography (the study of people in context) allows researchers to take advantage of these online market conversations. This practice is a huge shift from traditional research, in which a sample population must be assembled through recruitment. With online ethnography, researchers can listen directly to the market.

Online ethnography is especially useful in the initial creative phase of a product or idea generation cycle - for example, to gain early knowledge of consumer expectations, preferences and beliefs. Because no recruitment is required, online ethnography provides results much more quickly than most other qualitative techniques.

Conducting online ethnography

In 2003, our firm conducted a test of online ethnography to explore its possibilities. The results were so encouraging that we now offer online ethnography as part of our research practice. The discussion below presents some of the most important lessons we learned.

The topic we chose for our test was consumer perceptions of digital cameras. One of the reasons we chose this topic is that we had conducted offline research in this same area, and were interested in compar-

ing the two. A key finding of our test was that the offline results and the online results were very similar. (We are in the process of documenting the comparison.)

The main types of online communities are message boards, newsgroups, listservs and e-mail lists, chats and Web logs ("blogs"). While it was easy to find Web sites dedicated to our chosen topic, finding active communities with current, consistent, on-topic discourse took a bit



By Steve August

Using online ethnography to explore the digital camera market

Editor's note: Steve August is a principal of San Francisco-based KDA Research. He can be reached at steve@kdaresearch.com or at 415-826-4696.



THE INDUSTRY'S BEST KEPT SECRET

Our meticulous attention to detail has quietly made us the largest network of consistently top-rated focus group facilities anywhere. Revolutionary technology, amenities, service — it's all here. **Loud and clear.**

One click group-net.com | One call **800.288.8226**

- Atlanta: Jackson Associates, Inc. 770.394.8700
- Boston: Boston Field & Focus-Performance Plus 617.720.1870
- Boston/Framingham: Boston Field & Focus-Performance Plus 617.720.1870
- Charlotte: Leibowitz Market Research Associates, Inc. 704.357.1961
- Chicago/Downtown: National Data Research, Inc. 847.501.3200
- Chicago/Northfield: National Data Research, Inc. 847.501.3200
- Cincinnati: QFact Marketing Research, Inc. 513.891.2271
- Dallas: Focus on Dallas, Inc. 972.960.5850
- Denver: AccuData Market Research, Inc. 800.808.3564
- Detroit: MORPACE International 248.737.5300
- Houston: Opinions Unlimited, Inc. 713.888.0202
- Indianapolis: Herron Associates, Inc. 800.392.3828
- Los Angeles/Beverly Hills: Adept Consumer Testing, Inc. 818.905.1525
- Los Angeles/Encino: Adept Consumer Testing, Inc. 818.905.1525
- Memphis: AccuData Market Research, Inc. 800.625.0405
- Minneapolis: Focus Market Research, Inc. 612.869.8181
- Northern New Jersey: Meadowlands Consumer Center, Inc. 800.998.4777
- Orlando: AccuData Market Research, Inc. 800.831.7744
- Philadelphia: Group Dynamics in Focus, Inc. 866.221.2038
- Phoenix: Focus Market Research, Inc. 480.874.2714
- Portland: Consumer Opinion Services, Inc. 503.493.2870
- Providence: Performance Plus 508.872.1287
- San Diego: Taylor Research, Inc. 619.299.6368
- San Francisco: Nichols Research, Inc. 408.773.8200
- San Francisco/Concord: Nichols Research, Inc. 408.773.8200
- San Jose: Nichols Research, Inc. 408.773.8200
- Seattle: Consumer Opinion Services, Inc. 206.241.6050
- Tampa: The Herron Group of Tampa, Inc. 813.282.0866
- Washington, D.C.: Shugoll Research, Inc. 301.656.0310
- United Kingdom/London: MORPACE International 011-44-1483737007



Group  **NET**
works

more effort. Groups.google.com was helpful in finding relevant news-groups, and various Web logs led us to the appropriate online communities. We found that moderated communities were the most efficient to study, because they contained far fewer off-topic and inappropriate posts.

We were interested to learn that many communities maintain accessible archives of their content, some for five years or more. Clearly, this presents an opportunity to study a subject over time extremely quickly and efficiently. Imagine, for example, an online study of the opinions of women over the course of their pregnancies; rather than having to conduct a nine-month study, a researcher could simply review nine months of archived conversation.

For our digital camera research test, we chose three communities to study, a Usenet newsgroup, a moderated message board and a moderated e-mail-based digital photography

group. All three groups archive their material, and we studied consumer conversation in these groups that covered a three- to six-month period.

Many online communities have a specific clause in their terms of service that state that the community is intended for personal and non-commercial use. It is our view that even for communities that do not make this explicit, the observation of consumers online as part of a research study is sufficiently different from an online community's intended use that researchers should request permission and/or make themselves known.

For the two moderated communities, we contacted the moderators and asked permission for our studies, which was readily granted. We also posted, in all three cases, to the communities themselves, letting members know that we were conducting a study and asking people to contact us if they wished their messages to

be excluded from the study. No one ever contacted us, and there were no posts within the communities regarding our activity.

In the course of our test, we downloaded data from the communities and imported it into a qualitative research software tool for coding and analysis. Once we considered our dataset to be complete, we performed a preliminary analysis to identify topics and themes that might merit further investigation. We then contacted several community members via e-mail and conducted follow-up e-mail interviews.

This ready access to community members via e-mail makes it relatively easy to conduct complementary and follow-up research. For example, we could have quickly conducted a quantitative study and/or formal in-depth interviews to round out the research results.

Key findings of the test

It became clear during the course of

Wondering how to more effectively survey those important to you?



MARKET RESEARCH SEMINARS

presented by Anderson, Niebuhr & Associates, Inc.

Analyzing & Reporting Questionnaire Data

Oct. 7-8, 2004 - Orlando • Oct. 28-29, 2004 - Minneapolis

Learn to understand statistics, develop a data analysis plan, select appropriate statistical procedures, understand multivariate statistics, prepare effective research reports and present research results.

Questionnaire Design & Use

Spring, 2005 • Contact us for dates and locations

Learn to construct high-quality questionnaires, manage market research projects, utilize sampling techniques, choose appropriate data collection methods and obtain response rates of more than 90%.

For more information or to register, visit www.ana-inc.com, call 800-678-5577 or e-mail seminar@ana-inc.com

Northpark Corporate Center • Suite 200 • 6 Pine Tree Drive • Arden Hills, Minnesota 55112



Anderson, Niebuhr & Associates, Inc.

our research that to truly understand the data, we needed to understand the community. Each community is different; for example, some of the groups we studied assumed a greater level of technical sophistication than others, a difference that is relevant to the interpretation of the conversations we observed. Just as a traditional ethnographer must understand the context in which the people being observed are acting, so must an online ethnographer.

Keeping in mind their relevant differences, however, we found some basic similarities among online communities. In each community we studied, we found a vocal minority posted most of the messages. These "denizens," as we have begun to call them, are generally lead users - in the case of our test, they were the owners of the newest equipment and the most knowledgeable about digital camera technologies and trends. On the other end of the spectrum, we found a "guest" behavior pattern, people who drop in to ask one or two questions but do not remain as part of the community.

By far the most common behavior pattern we saw was the sharing of experiences. The community members we observed clearly used these shared experiences as a way to validate the information they had gathered from other sources, such as reviews and manufacturers' marketing claims.

Another common behavior we saw was that guests often came to the communities to make their final purchasing decisions. Often they had narrowed their choices to two or three options before visiting an online community.

We also found that members of a community are vocal about which online and offline information sources are most trustworthy. Clearly, this knowledge of trusted sources could be of great value to marketers.

In terms of specific findings, we were impressed by how quickly we were able to gain a substantial amount of insight into the digital



Leading the Way in Qualitative Research

QRCA is the largest body of independent qualitative research consultants in the world, with over 800 experienced qualitative research professionals from over 20 countries. All QRCA members sign the QRCA Code of Member Ethics and pledge to maintain integrity in their relationships with clients, field suppliers, and respondents. QRCA is on the forefront of trends and innovations in qualitative research worldwide. QRCA members share their resources, expertise, and knowledge to continually raise the standards of excellence in the profession.

Promoting Excellence in Qualitative Research



QRCA
Qualitative Research
Consultants Association

Go to **www.qrca.org** to
"Find A Consultant" and use
our other helpful resources

Qualitative Research Consultants Association, Inc.
P.O. Box 967 • Camden, TN 38320
(888) 674-7722 toll free
(731) 584-8080 • (731) 584-7882 fax

camera market through our study of the three online communities. Here are some of the things we learned:

- Based on our observation of the consumer discussions, we see an opportunity for travel cameras as a market category.

- Many of the inquiries about digital cameras were made by those seeking to purchase a camera for workplace rather than personal use.

- Digital storage is still one of the biggest technical issues of interest.

- There are three clear brand leaders in the category, two brands that are also fairly popular, and several brands that are generally considered inferior.

- One of the top three brands is considered more expensive than others, and its proprietary technology is considered by many to be a negative.

- Brand impressions of traditional cameras do not necessarily carry over into the digital camera category.

- Community members were unimpressed by the attempts by high-end traditional camera manu-

facturers to leverage their brands by re-branding cameras made by other, less prestigious, manufacturers.

Discover rather than invent

Online ethnography provides significant benefits. It is extremely fast and efficient – an online ethnography project can be completed in less time than it takes just to recruit participants (one or two weeks).

Because participants in online communities segment themselves into market categories and consumer types, researchers have the opportunity to discover market segments rather than inventing them. The archiving of online material allows researchers to instantly gather historical data. And because online conversation is by its very nature up-to-date, online ethnography allows researchers to study trends as they form, while they are taking place.

Some researchers may be uncomfortable with the self-segmented nature of online populations. While

self-selection is generally considered a negative in traditional research, we believe that self-segmentation via Internet conversation is a different matter. The fact that these consumers are interested enough in a given topic to participate in a market-oriented online discussion makes them arguably more qualified for a study on that topic than respondents who agree to participate in a focus group for a fee.

Online ethnography represents a shift in thinking. Instead of attempting to replicate the desired target population with a recruited sample, it takes advantage of a target population that already exists. In addition to studying what has already happened, it allows us to study what is happening right now. And beyond using the Internet simply to gather and deliver data more efficiently, online ethnography provides a way to harness one of the most exciting aspects of the Internet: its power to connect people and markets united by interests but separated by geography. | Q

Have You Lost Your Direction?



Let Advantage Research, Inc. guide you in the right direction for timely and accurate marketing research services.

Our services include:

- Implementation of computer-aided telephone surveys
- Mail & internet-based surveys • Focus group facilities & moderating

*Call 1-877-477-7001
for fast quotes and
responsive customer service!*



**ADVANTAGE
RESEARCH
INCORPORATED**

Worldwide network, moving cameras,
broadcast quality equipment...

With FocusVision
the difference is perfectly clear.

Only FocusVision has live camera operators, dedicated equipment, and a 24 hour technical support center to monitor projects anytime and anywhere in the world. International users also benefit from the ability to hear the live simultaneous language translation at their viewing location.



Global Researchers, view your live focus groups from around the world without travel. FocusVision is the world leader in the live transmission of qualitative research from a network of over 250 top-rated, independent focus facilities. The same facilities you probably use now.

Whether it is FocusVision VideoConferencing or VideoStreaming (or both) your projects will benefit from the increased participation that real-time, remote viewing makes possible while saving time and reducing the costs and hassles associated with travel.

WESTERN EUROPE/UK

BELGIUM
Antwerp
Synovate Belgium

DENMARK
Copenhagen
GfK Denmark A/S

ENGLAND
Birmingham
Midlands-On-View
Second City Studios
East Molesey
Viewpoint Studios II
London
City Financial Focus-City Focus Ltd
Field Facts Worldwide
London Focus
Quality Medical Field
Manchester (Cheshire)
Fast Forward Research
Sunbury-on-Thames
Viewpoint Studios

FRANCE
Lille
Agora/CARE
Lyon
Marketing Espace
Synovate France
Paris
Catherine Delannoy & Associates
Field Facts Worldwide
GfK/Sofema S.A.R.L.
La Maison Du Test
MV2 Conseil
Novatest
Puzzle
Reunions Services

GERMANY
Berlin
Answers Test Studio GmbH
Freyer Marktforschung GmbH
Interview + Exploration
Marktforschung Berlin GmbH

Frankfurt
Field Facts Worldwide
GO Medizinische Marktforschung GmbH
Interview + Exploration Julia Otte GmbH
IntraTeam GmbH
Objective Consumer Research & Consulting GmbH

Hamburg
Answers Test Studio GmbH
GfK Data Services
INRA Deutschland
Interview + Exploration Julia Otte GmbH
Schwieger Marktforschung

Munich
Freyer Marktforschung GmbH
Interview + Exploration GmbH

Nurnberg
Concentra
Wiesbaden/Frankfurt
Synovate Germany

ITALY
Milan
CIRM
ISI International Surveys in Italy
Spazio Milano
Naples
ADACTA
Rome
A.M.T. Consulting
GfK-ASM
PRAGMA
SGR International
Studio Nardo
Torino
Quality Medical Field

THE NETHERLANDS
Amsterdam
Synovate The Netherlands

SPAIN
Barcelona
Delta Market Research
Estudio Silvia Roca
Synovate Barcelona
Madrid
Delta Market Research
Escario & Associates

Merka Star Research
Nueva Investigacion
Nueva Sala
QUID Investigacion de Mercados
Salas Castello-23
Synovate Madrid

SWEDEN
Stockholm
Borell Market Research
IMRI-International Marketing Research Institute

EASTERN EUROPE

CZECH REPUBLIC

Prague
GfK PRAHA

POLAND

Warsaw
EEI Market Research
GfK Warsaw

M. EAST & AFRICA

MOROCCO
Casablanca
Synovate (MEMRB)

NORTH AMERICA

CANADA
Toronto
Toronto Focus

ASIA PACIFIC

AUSTRALIA
Melbourne
Viewpoint Group Rooms

CHINA

Beijing
Acorn-Vantage Marketing & Research Co.
Guangzhou
Acorn-Vantage Marketing & Research Co.
Hong Kong
Acorn Marketing & Research Consultants
Shanghai
Acorn-Vantage Marketing & Research Co.

JAPAN

Osaka
Japan Statistics & Research Co.

Pulse Co., Ltd
Tokyo
Infoplan Inc.
Japan Statistics & Research Co.
JMRB Research International Japan
LYNCS - Market Focus

KOREA
Seoul
Acorn Marketing and Research Consultants
Gallup Korea

MALAYSIA

Kuala Lumpur
Acorn Marketing & Research Consultants

PHILIPPINES

Manila/Makati City
FB Consumer Research Services

SINGAPORE

Singapore
Acorn Marketing & Research Consultants

TAIWAN

Taipei
Acorn Marketing & Research Consultants

THAILAND

Bangkok
Consumer Insights Co., Ltd.

LATIN AMERICA

ARGENTINA

Buenos Aires
Infoquality

BRAZIL

Sao Paulo
Demanda
EP Escritorio de Pesquisa
IARC Pesquisa de Marketing
Target Pesquisas E Servicos de Marketing LTDA

MEXICO

Mexico City
Facta Research
Investigacion Integral de Mercados S.C.-Intermerk
NODO (Pearson)

VENEZUELA

Caracas
Esmefar-Estime Marketing Research Venezuela

Plus over 150 U.S. facilities



1266 East Main Street, Stamford, CT 06902
203-961-1715 Fax: 203-961-0193
Email: info@focusvision.com Website: www.focusvision.com

Hybrid vehicle

We all know that once users arrive at a Web site, a poor experience can quickly drive them away. In order to realize business objectives through their Web site, companies must balance creative design, functionality and user experience. Within the market research toolkit, online usability solutions have slowly but surely gained acceptance as a viable choice. Properly applied, the quantitative and qualitative data collected can provide a wealth of specific information to ensure a maximized user experience.

In addition to its value for strict usability research, a successful application for online usability is research into Web site best practices. Typically, Web site best practices are determined by utilizing focus groups to explore several Web sites in depth, discussing their merits in isolation and as compared to each other.

Case study

As detailed below, a typical best-practice research methodology using focus groups was modified and expanded for deployment with an online usability solution. The challenge: A major U.S. insurance company needed to determine the best way to display an agent zip code locator on its site and determine precisely how it should work.

Best-practice research is typically performed as follows:

Setup

- Four focus groups of participants with 10 to 12 individuals per group are recruited.
- Each session is up to two hours in duration.
- One moderator drives each session.
- The session is conducted in a typical focus group manner where questions are open to any participant to respond. The moderator is

in charge of ensuring that comments and responses are from a cross-section of the group to prevent a strong personality from dominating the conversation. The moderator is also able to elicit responses from those participants who are less likely to speak up.

- The moderator controls a single computer and the screen is projected to the front of the room for all participants to view. When navigation through the Web sites is required, the participants direct the moderator as to the path to be taken.



By Nancy Bristow
and Kenneth Yang

Insurance company
combines methods
for Web site
usability research

Editor's note: Nancy Bristow is senior managing director at Frank N. Magid Associates, a New York research firm. She can be reached at 212-974-2310 or at nbristow@magid.com. Kenneth Yang is director of business development at RelevantView, a Westport, Conn., research firm. He can be reached at 203-221-1310 x106 or at kyang@relevantview.com.

Transforming the Web

with state-of-the-art Web surveys and online reporting



Information drives your ability to achieve organizational goals. DRC's innovative Web solutions put information at your fingertips.

With over 25 years of experience conducting large-scale customer satisfaction surveys, 360° feedback programs, and employee opinion surveys, DRC can help you transform data into the power to meet your goals and objectives.

Our proprietary Web survey system provides seamless process integration that makes creating survey formats, collecting data, and reporting results easy and cost effective.

The results are extraordinary.

Delivering Solutions

Customer
Satisfaction
Surveys

Employee
Surveys

360° Feedback

Web Surveys
and Reports

Research
Consulting

Leading the way.

DATA RECOGNITION
DRC
CORPORATION

Study

- Initial questioning occurs.
- The current client Web site is shown for specific reactions and discussion. The objective is to gauge the initial opinion of the participants about the Web site. An example line of questioning is as follows:
 - If you wanted to find an agent near you where would you click?
 - What do you expect to see after you click?
 - [Moderator navigates through the Web site based on the previous answer] Is this what you expected?
 - What do you think of how the results are displayed?
 - What would you do next?
- Competitor Web sites are shown for specific reactions and discussion with the same line of questioning. Comparing the Web site to competitor Web sites is important in order to understand industry best practices as well as the client's position in the landscape.
- Non-industry Web sites are shown for specific reactions and discussion with the same line of questioning. Including non-industry Web sites is important to avoid developing ideas about changes to the client's current site in a vacuum. There are many innovative ideas generated in other industries that can be highly effective for usability if incorporated or modified for a client's application.

- Lastly, the client Web site is shown to discuss how it could be improved in light of all of the other sites just seen: Where do you think the agent zip code locator should be placed? How should it be labeled? How should you be able to sort the results? Is it currently clear, or is anything confusing? What is missing?

Hybrid online methodology

In short, online usability testing allows surveying without utilizing a focus group set-up (a moderator in-person in a facility) by enabling the participants to go through a series of live Web sites to perform tasks

and answer questions. As a result, the research gathers behavior through analysis of the clickstream data and opinions through the accompanying questionnaire.

Setup

- The survey was 30 minutes in length with an appropriate cash incentive to mitigate the abandonment rate and ensure achievement of the targeted sample numbers.
- Without geographic limitations, the sample was expanded from 40 qualitative participants to a sample size of 600 quantitative/qualitative participants.
- We focused on the client's top three target audiences with 200 participants in each group.
- Recruitment of the nationwide sample was through an e-mail invitation containing a link to the survey.

Study

- We showed the current client Web site and instructed the participants to perform tasks and then asked pointed questions after each task. Using RelevantView's technology we were able to have the respondents perform the same tasks that a moderator would normally perform in a focus group setting. More importantly, instead of asking them where they would click, we could see their behavior through clickstream analysis.

An example task followed by opinion questions would be as follows:

- The instruction, "Please click on the agent zip code locator," was in the left window and the live Web site was displayed in the main browser window.

When the respondent interacted with the Web site, the clickstream data was collected, capturing the respondents' path and the time spent on each page.

- How easy was it to find?
- Is this what you expected to see?
- If not, please describe what you

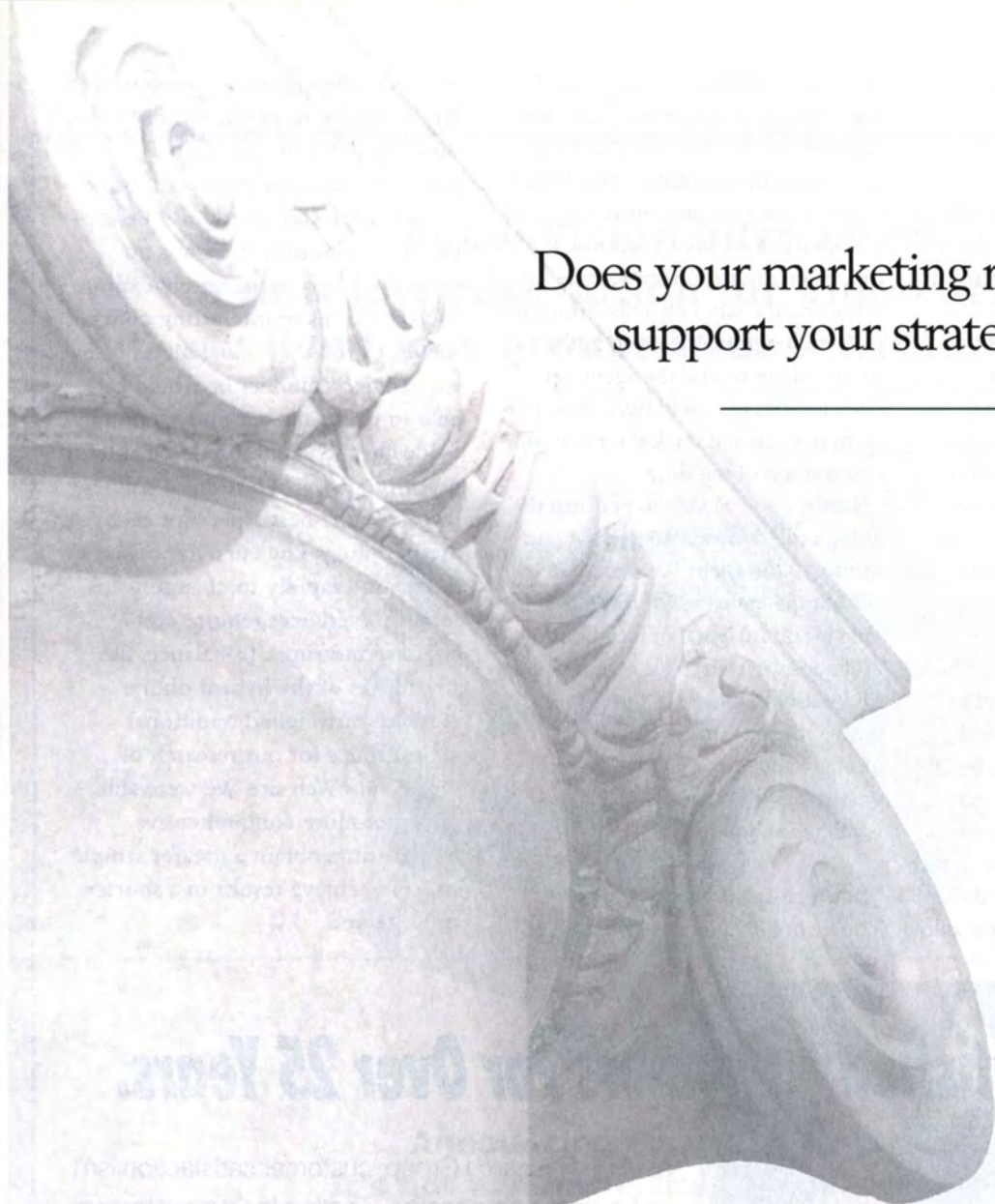
expected to see.

- We showed competitor Web sites using the same tasks and follow-up questioning.
- We showed non-insurance industry Web sites, and used the same (or similar) tasks and follow-up questioning.
- We showed the client Web site again, and asked follow-up questions about the tasks that were performed as compared to the other Web sites.
- Lastly, we asked questions on desirability, importance and intent to use certain features.

In the focus groups, we were limited to asking questions as to how participants would perform the tasks. Using the hybrid online approach, the modification involved asking the respondent to perform an action: click on the agent zip code locator. The task was then followed by opinion questions similar to ones posed in the focus group. The advantage with the hybrid online approach is the ability to survey a large number of respondents who are geographically dispersed in order to track clickstream data and analyze that information and the corresponding opinions.

When assigning a task to the respondent, it is key that the wording of the instructions be clear. Since there is no moderator for intervention, a poorly-worded instruction could create less reliable results.

In traditional focus groups, the moderator can gather a broad range of opinions during the course of a session. Since respondents are less likely to provide detailed answers to open-ended questions online, we use specific, directed questions (i.e., How easy was it to find the agent zip code locator? Not easy, easy, neither easy nor hard, hard, very hard). We then follow up with an open-ended question after a series of directed questions. Although you may lose some of the organic thought from discussion groups, the follow-up question provides more



Does your marketing research
support your strategy?

It should.

TRADITIONAL

www.olsonresearchgroup.com

ONLINE



p 609.882.9888 f 609.882.9826

than enough insight of various opinions.

Benefits

The hybrid online method yielded multiple benefits. First, we gathered more comprehensive information in comparison to standard focus groups. Although qualitative information is necessary to gain an understanding of the emotional mindset, viewing the results next to quantitative data created a holistic view of the user experience. The fact that the study was online also allowed us to get a larger sample (increased from 40 to 600 respondents) that was geographically diverse.

The time savings were invaluable. We were able to cut the time for the project from start to final report by 50 percent. Without the travel time to multiple locations, we were able to focus on development and analysis, and still decrease the overall time of the research. As a result, the client was able

to get actionable, robust results and react quickly to user preferences and improve the functionality that invariably affects the goodwill of the brand.

The online test also streamlined the best-practice research, requiring less time from the respondents while achieving the same objective. Instead of spending time discussing in the group where to find the agent zip code locator, we could have them perform the task and track their behavior in a fraction of the time.

Lastly, we were able to perform the entire project with a 40 percent cost savings to the client. We were able to cut out the expenses for travel to multiple locations, rental of facilities, and other costs related to each geographical location. Outside of the obvious savings, the client had additional money to act on the research results as well as funding work on additional usability issues.

Main limitation

The main limitation was the lack of

personal observations. Although we could ask the respondents for their opinion, physical cues such as a raised eyebrow, quizzical expression or change in tone could not be captured. In addition, there was no opportunity to immediately explore such reactions or interesting comments. In the traditional method, an experienced moderator would be able to gain a deeper understanding.

Ideally, the client would be able to go through a progression of studies to garner the best aspects of each methodology. The current pressures to respond rapidly to changing customer preferences require cost-effective measures. In balance, the advantages of the hybrid online method outweighed traditional focus groups for our research on this client's Web site. We were able to gather more comprehensive information, obtain a greater sample size and achieve results in a shorter time period. | Q



Creating Satisfied Customers For Over 25 Years.

At I/H/R Research Group, customer satisfaction isn't just a goal - it's a reality. That's why our customers return again and again. Our intensive interviewer hiring and training process yields superior interviewers. Superior interviewers means superior results, with a higher level of productivity. Plus, our state-of-the-art systems combined with innovative phone center management software, such as CATIHelp and Collective InfoSystems, make the I/H/R experience second to none.

Let I/H/R Research Group make customer satisfaction a reality for you on your next project, with top quality data collection at the lowest prices, on-time results, and the attention to detail you deserve.

I/H/R Research Group

(800) 254-0076 • (702) 734-0757

www.ihr-research.com • info@ihr-research.com

**FocusVision introduces
a new low cost option for Videostreaming
live focus groups over the internet.**



**Announcing FocusVision Basic.
It's not just basic, it's FocusVision Basic.**

Two Service Options

Select the new Basic service for a single camera view and the lowest price in the industry. Or choose the Premium service and get a FocusVision technician on-site at the facility operating a moving camera system for close-ups and full group views.

Crystal Clear Audio and Video

Regardless of the option you choose, you get crystal clear picture and sound because FocusVision uses its own dedicated equipment specifically designed for video transmission and perfectly positioned for the best viewing and listening experience.

No Short Cuts

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

The World Leader

With over 250 focus facilities worldwide, FocusVision is the only company that can offer you videostreaming and videoconferencing solutions and the choice between a moving camera system and the lowest price in the industry.

More than 500 companies, including two thirds of the top 100 U.S. advertisers, use FocusVision regularly. Maybe you should, too.



FocusVision™
WORLDWIDE, INC.

Keep up the pace

It's very difficult to look at a new medium with fresh eyes. During the early days of television, many producers thought of it as radio with pictures, and indeed, the first television broadcast was a radio concert. At the same time, producers with a movie background looked at the emerging medium of television from their perspective, seeing both visual limitations and visual possibilities. These two influences, radio and movies, both contributed to the early development of television. But they also imposed conceptual limits that would eventually fall away once the first generation of pure television producers arose.

I see a parallel with today's online research practices. If our background is survey-based research, we look at the Internet and see faster surveys at a lower cost, and may simply put the mail survey or telephone script online. If our background is focus groups, we look at the Internet and see geographically dispersed focus groups without travel, and just put the discussion guide and moderation online. But what we are really faced with is an entirely new medium with which to conduct research.

Harnessing market dialog

In this new online world we inhabit, expectations are different. We expect immediacy, anonymity and access. We expect to find what we are looking for, and we expect the opportunity to contribute our own ideas as we see fit. For example, most articles one reads online provide an opportunity for readers to comment on what they have just read. We

also expect to make connections with others online, from reading the other comments about that online article to e-mailing someone we had never heard of until this moment.

These expectations work to our advantage in online research – if we, as researchers, can learn to get out of the way.


Take, for example, a project we were involved in for a biotechnology company last year. The goal of the project was to test the concept for a new instrument used by a certain type of biochemist. The company had tried two traditional (in-person) focus groups, but these had failed. The respondents that had been recruited were not all at the same professional level, so it was difficult to engage the group in problem-solving. For an online group, recruitment can be nationwide, making it much easier to find exactly the right people. By recruiting the right target and watching the scientists collaborate on the problem, the solution became



By Linda Stegeman

The case for real-time research

Editor's note: Linda Stegeman is president of Artafact LLC, a Fremont, Calif., research company. She can be reached at 510-651-9178 or at lstegeman@artafact.com.



Connect with
respondents
more efficiently

When we created the **GENESYS** RDD in-house sampling system over 15 years ago, this enabled researchers to gain control over the design and production of highly efficient, quality RDD samples at the lowest possible cost.

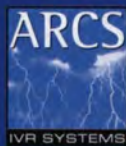
Our complete line of attended sample screening services including the new **GENESYS-CSS** Comprehensive Sample Screening service have successfully redefined the-state-of-the-art by identifying not only a significantly higher percentage of non-productive numbers but also ALL TYPES of wireless numbers – both dedicated and ported from landlines – enabling you to be fully compliant with all TCPA guidelines.

The introduction and now global market leadership of our **PRO-T'S** *research* Predictive dialer and interviewer management system has increased accuracy and productivity so much that companies find that it pays for itself within six months and provides ongoing savings well beyond its initial cost.

Our acquisition of **ARCS**® IVR technologies, the leading supplier of research IVR solutions, provides you with additional capabilities including simultaneous inbound/outbound IVR options, panel management/scheduling, concurrent WEB/IVR survey capabilities and multiple project support. It also integrates smoothly with our **PRO-T'S** dialer and others.

Partnering with Common Knowledge Research Services, we have been able to integrate a high quality multi-source Internet panel to provide additional ways for you to connect with your respondents.

Our mixed mode sample methodologies ranging from area probability to postal/dwelling unit based approaches, or combinations of phone/IVR/mail or Internet, will let you reach respondents more efficiently than ever before.



MARKETING SYSTEMS GROUP

Leadership Through Innovation

800.336.7674

www.m-s-g.com

Philadelphia, PA
Lincoln, NE
Research Triangle, NC
Los Angeles, CA

obvious.

Online research has the potential to remove the barrier between the client and the research results, enabling what amounts to a direct dialog with the market. It's one thing to have your engineering vice president on the other side of the mirror during a focus group; it's quite another thing to have entire engineering teams, wherever they are in the world, listening to their customers speak candidly about the use of a given product. Some of the most important findings in our projects have resulted from the impromptu questions initiated by observers on the client side, in real time, based on what they have just learned.

Provides flexibility

Online research provides incredible flexibility. For example, we just did a project for an online travel company where a competitor launched a new site in the middle of the research project. No problem: we just incorporated the old and the new into the

research.

Increased client involvement also turns out to be a huge benefit. In addition to the ability to observe and contribute directly to the research, simply having a shorter project helps clients to stay focused. A project can be fielded in as little as a week.

Transcripts of the session are available immediately, with analysis available in a few days rather than a few weeks. A short research cycle yielding up-to-the-minute information also makes it much more likely that a client can quickly apply what has been learned right away to make better business decisions.

A new view of respondents

Online research can also add entertainment value. This leverages one of the main reasons people go online - to have fun. Our customer satisfaction survey data consistently shows that most of our research participants enjoy participating in the process. I find this remarkable.

The traditional view of respon-

dents has been almost adversarial. Most people don't want to be bothered with surveys, this view holds, so we either have to provide an incentive or use large amounts of sample to overcome the problem with brute force. And to capture a respondent's attention for a full hour is certainly expected to require a substantial incentive.

Indeed, these traditional views are true - when it comes to traditional research. It's no secret that overall response rates for phone surveys, for example, are dropping alarmingly. Those who are studying this problem are learning some interesting things about today's respondents. As some researchers in fields like customer satisfaction have known for quite some time, the strongest motivation for research participation is the desire to make a difference, especially in areas that we care about personally. Customer satisfaction research usually doesn't require any incentive - customers are generally willing to provide their opinions to companies

FREE FACILITY RENTAL*



Everyone who has used our facility has come back again and again. Maybe that's why we are highly rated in the Impulse Survey of Research Facilities. We'd like to be able to add your company to our growing list of satisfied clients. Give us a call today to reserve a date in 2004 for your next research project. Your first rental is on us.

***There is no fine print. In fact, audiotaping and stationary videotaping are also free. You pay only for incentives, recruiting and food.**

**FRANKLIN
COMMUNICATIONS**

200 Valley Road, Mount Arlington, NJ 07856
973 601-0111 • Fax: 973 601-0109

www.fc4research.com

Who's running your Web survey project?



FieldFacility.com

we do the heavy lifting of online survey research

eFieldFacility.com, by **Database Sciences**, is a complete online quantitative research field service. From sampling to data delivery, we handle every detail of online field work.

Driving the eFieldFacility concept is Database Sciences' proprietary Web surveying software suite. We use it in what is known as an ASP, or Application Service Provider, platform to help our clients conduct research.

In English, that means that we offer the online equivalent of the mall intercept company, the telephone interviewing house, and the focus group facility. Every day, our clients have access to state-of-the-art online research tools without having to invest time, money, or peoplepower in hardware, software, or training. While we are fielding feature-rich online surveys for them efficiently and economically, they can focus their energies and resources on their core businesses.

Serious Tools for Research Professionals

We are a research field service first, and a technology company second. Our experienced team understands the requirements of field work and our technical staff is constantly pushing the envelope in applying the latest Web technologies to traditional research tasks.

Also, we understand the value of every respondent's opinion and strive to make the online survey environment user-friendly and enjoyable. We offer a responsive online help desk to our panel respondents (and our clients') so that we keep respondents engaged and maximize response rates.

At the end of the fielding process, we deliver data in a variety of formats. Whether a client wants a complete tab analysis or raw data compatible with legacy Column Binary systems, we are able to accommodate them.

For more information, please contact
Richard Raffel, Director of Business Development
by phone at 1-800-742-6035, ext. 12
or by e-mail: r Raffel@dbsciences.com



with whom they have a relationship.

This principle of drawing on people's natural motivation to be helpful, and their natural curiosity, can easily be applied outside of customer research, as we found with our biotechnology group. These chemists are a natural community, they had things in common that made them interested in exploring the issues at hand. All we really had to do was create the opportunity for discussion and then listen in.

As the Internet evolves we will have more and more opportunities to leverage online activities for research purposes. Online ethnography, for example, is already emerging. I expect that in the next few years we will see the use of simulations in research, and research in the form of competitions or games.

The Internet already allows direct observation of consumer buying behavior. Last month I was defining a survey for a prospect who needs to learn more about how customers are using an e-commerce Web site.

People visit, but not enough of them download the product. We started thinking about how we could design a study to replicate this situation and then we realized we didn't have to - all that's needed is to point the respondents in the right direction, watch what they do, and ask them to comment.

A glimpse of the future

The next generation of Internet research will be driven by a new understanding and appreciation of human behavior, both in general and as it applies to online interactions. The computer science community is making interesting findings in the area of computer-mediated conversation and the ways in which the Internet is enabling new forms of conversational practice.¹ I expect such findings will help to transform our field.

Another trend I see having an impact on research is the growing use of multiple media at one time. Over 20 percent of U.S. consumers across

all age groups say they are regularly online while watching television.² Television advertisers have begun to take advantage of this, as with the Super Bowl commercial that sent viewers online to see the rest of the story - a superb use of multimedia advertising that takes advantage of our new multimedia world. Researchers can also leverage this development.

We are only at the beginning of exploring this new medium of Internet research. In another 10 years, online research will have characteristics we can't yet imagine. But there's no reason to wait until the transformation is complete. Online research is the right tool for the job today. After all, business is real-time. Why shouldn't research be real-time as well? | Q

References

1 Hawaii International Conference on System Sciences, Persistent Conversations mini-track (www.hicss.hawaii.edu).

2 Big Research, April 2003.



We won't hang you out to dry.

Research

RESOLUTIONS
RESEARCH

- QUANTITATIVE AND QUALITATIVE
- MULTI-PANEL SOLUTION
- 7 MILLION+ ONLINE PANELISTS IN OVER 40 COUNTRIES
- OVER 400 SEGMENTATION VARIABLES
- PROVIDING ONLINE PANEL ONLY
- PROGRAMMING TO ANALYSIS AS NEEDED
- CONSUMERS AND B2B INCLUDING:
 - B2B DECISION MAKERS
 - LOW INCIDENCE RESPONDENTS
 - PHYSICIAN AND PATIENT PANELS
 - HISPANIC PANELS

Same day turnaround on your bid requests, competitive and flexible pricing, and when we give you our word that we can complete your projects, we take on the onus of responsibility for doing just that.

info@researchresolutions.com
www.researchresolutions.com
2 1 4 . 2 3 9 . 3 9 3 9

Introducing...

The

Opinion Suites™

Among The Best:

Qualitatively
Technologically
Aesthetically

OpinionSuites.com

Survey Monitor

continued from page 8

brands, according to R. L. Polk & Co., Southfield, Mich.

In calendar year 2003, Ford captured 15.9 percent of all new vehicle registrations made by Hispanic-Americans in the United States. Toyota and Chevrolet follow in a virtual dead heat, each with slightly more than 14 percent of the market among American consumers of Hispanic heritage.

In 2004, Toyota has made a strong push to solidify itself in the second position overall. In the first quarter of 2004, Toyota captured 37,353 Hispanic registrations, or 15.5 percent of Hispanic market share. This eclipsed Ford's share of 15.4 percent, or 36,989 registrations, during the first three months of 2004.

"While they technically remain a minority group, Hispanic-Americans can no longer be considered a niche market," says Lonnie Miller, director of analytical solutions for R. L. Polk & Co. "Hispanics are growing, both in numbers and consumer influence. Automotive manufacturers are taking notice and delivering products that appeal in all the traditional ways - design, price, performance and utility."

Overall, Hispanic-Americans account for 6 percent of the U.S. automotive market, compared to 4.8 percent in 1999. This represents a 25.7 percent increase in volume of new vehicle registrations in just five years.

According to the U. S. Census Bureau, the percentage of U.S. population identifying itself as "Hispanic" grew much faster than the population as a whole - increasing from 35.3 million people in 2000 to 38.8 million in 2002. Hispanics are now the nation's largest minority group, and are becoming increasingly more influential in their collective purchasing power.

During calendar year 2003, Los Angeles and New York retained

their number one and two positions as the home markets of the most Hispanic auto buyers, with 185,165 and 74,883 registrations, respectively. Miami/Ft. Lauderdale was third with 70,613 registrations, followed by Houston with 40,033 registrations. "Over the past five years, the growing influence of Hispanic-American consumers has become clear in many major markets," Miller says. "Over a five-year period, the Hispanic-American automotive market has significantly outperformed the general market in several major metropolitan areas, including Los Angeles, New York, Miami and Dallas-Fort Worth." For more information visit www.polk.com.

Vertis looks at grocery shopping

The Customer Focus 2004: Grocery study from Baltimore-based marketing services firm Vertis reveals that 71 percent of female chief grocery shoppers (those responsible for 60 percent or more of household grocery shopping) who read advertising inserts make lists and plan their grocery shopping trips based on items they see advertised in advertising inserts or circulars. "Our study shows that women in this category find great value in advertising inserts and circulars," says Therese Mulvey, vice president marketing research at Vertis. "Grocery marketers who want to have an impact with female chief grocery shoppers should consider the significant role this medium has in determining which items are purchased and where they purchase them."

The study shows the following additional findings, which provide insight into the differences in consumers' grocery purchase plans and trends.

Twenty-eight percent of total adults surveyed in the 2004 study indicated that advertising inserts and circulars most influence their buying decisions, 6 percent more

than total adults who said that they are most influenced by television.

Of the Sunday newspaper readers surveyed, 84 percent of women indicated that they read Sunday advertising inserts in the past seven days, compared to 79 percent of total adults. Of the weekday newspaper readers surveyed, 69 percent of women indicated that they had read an advertising insert in the last seven days, compared to 66 percent of total adults.

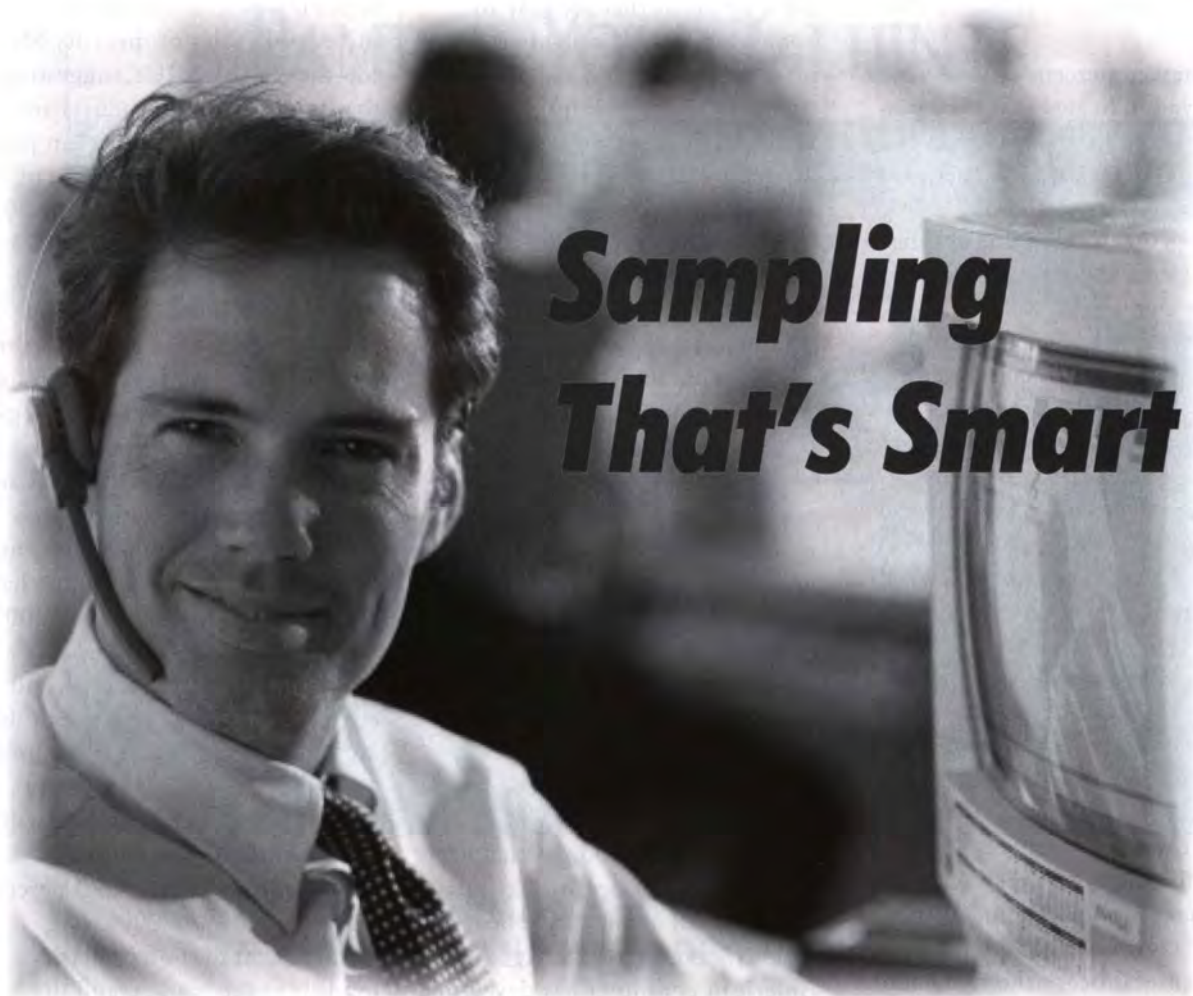
Twenty-one percent of female chief grocery shoppers surveyed said they read all available advertising inserts or circulars, compared to 17 percent of total adults.

Forty-eight percent of Generation X (1965-1976) women who are grocery advertising insert readers said they regularly use coupons received from grocery advertising inserts or circulars, compared to 44 percent of total adults.

Who really are the chief grocery shoppers? Eighty-five percent of women indicated that they personally conduct 60 percent or more of the grocery shopping for their household in 2004. By comparison, 50 percent of the men surveyed indicated that they conduct 60 percent or more of the grocery shopping for their household in 2004.

Super discount stores and super-sized grocery stores offer alternatives: 21 percent of total adult grocery shoppers surveyed indicated that they purchased perishable products such as meat, produce, dairy or bakery items at a super discount store (i.e., Wal-Mart Super Center, Meijer, Super Target) in the last two weeks, compared to 13 percent who purchase the same items at wholesale and warehouse club stores (i.e., Sam's, BJ's or Costco).

Nineteen percent of total adult grocery shoppers surveyed indicated that they purchased non-perishable products such as rice, pasta, canned goods, cereals, etc., at a super-sized grocery store in the last



Sampling That's Smart

Scientific Telephone Samples (STS) offers a comprehensive array of random digit (RDD), listed, and business samples for marketing research. Since 1988, our commitment to quality, outstanding customer service, and the lowest prices has made STS the smart choice for accurate, timely, and productive sampling. Smart - because you'll always have the most

current data, on time, every time. Smart - because each sample is 100% guaranteed for quality. Smart - because you're saving money. Smart - because you can rest assured that our added dimension of broad-based research knowledge will help guarantee every sample developed by STS will be the finest available anywhere.



***RDD samples from 2¢ to 5¢ per number.
Listed samples from 6¢ to 12¢ per number.***

STS
SCIENTIFIC
TELEPHONE
SAMPLES

(800) 944-4-STS • (949) 461-5400 • www.stssamples.com • info@stssamples.com

two weeks, compared to 10 percent who purchase the same items at wholesale and warehouse club stores.

Nineteen percent of total adults surveyed indicated that they purchased paper products such as napkins, paper plates, and paper towels at a super discount store, compared to 12 percent who purchase the same items at wholesale and warehouse club stores.

Of the total non-perishable product shoppers that purchased items at an outlet other than a grocery store, 25 percent indicated that they spent \$101 or more.

Asked about what they viewed as the most trusted packaging, of the chief grocery shoppers surveyed, 39 percent of total adults said they view frozen boxes and bags (i.e., raw or cooked meat or chicken in the freezer) as the safest type of food packaging. Thirty-two percent of total chief grocery shopping adults indicated that they view fresh tray wrapped (i.e., a Styrofoam tray wrapped with cellophane) food packaging as the safest. Conversely, 13 percent of total chief grocery shopping adults view dried shelf items (i.e., chicken snacks, Slim Jim, beef jerky) as the safest type of food packaging. Eleven percent of total chief grocery shopping adults consider fully cooked and refrigerated (i.e., roasted chicken or whole birds) packages as safest. For more information visit www.vertisinc.com.

Americans expressing their epicuriosity

Research by Chicago-based Mintel for the National Association for the Specialty Food Trade, Inc. (NASFT) shows that American consumers are becoming more sophisticated with their culinary selections. No longer do we settle for the basic ingredients – it is increasingly more common to use gourmet specialty foods to spice up our everyday meals. Younger generations lack the culinary skills

that older age groups have, and therefore use specialty foods to dress up meals that are easy to cook such as a plain sandwich, piece of meat or fish for dinner, or simple salad. In addition, the accessibility of higher quality and more unique ready meals is making it easier to sample specialty foods and to be introduced to more unique cuisines. Retail outlets such as Trader Joe's offer many gourmet ready meal selections that only require a microwave to prepare a restaurant-quality meal. In addition, media influences such as gourmet food TV shows, specialty cooking magazines, and daily newspapers with sections on more involved food choices are encouraging Americans to become more adventurous with their palates.

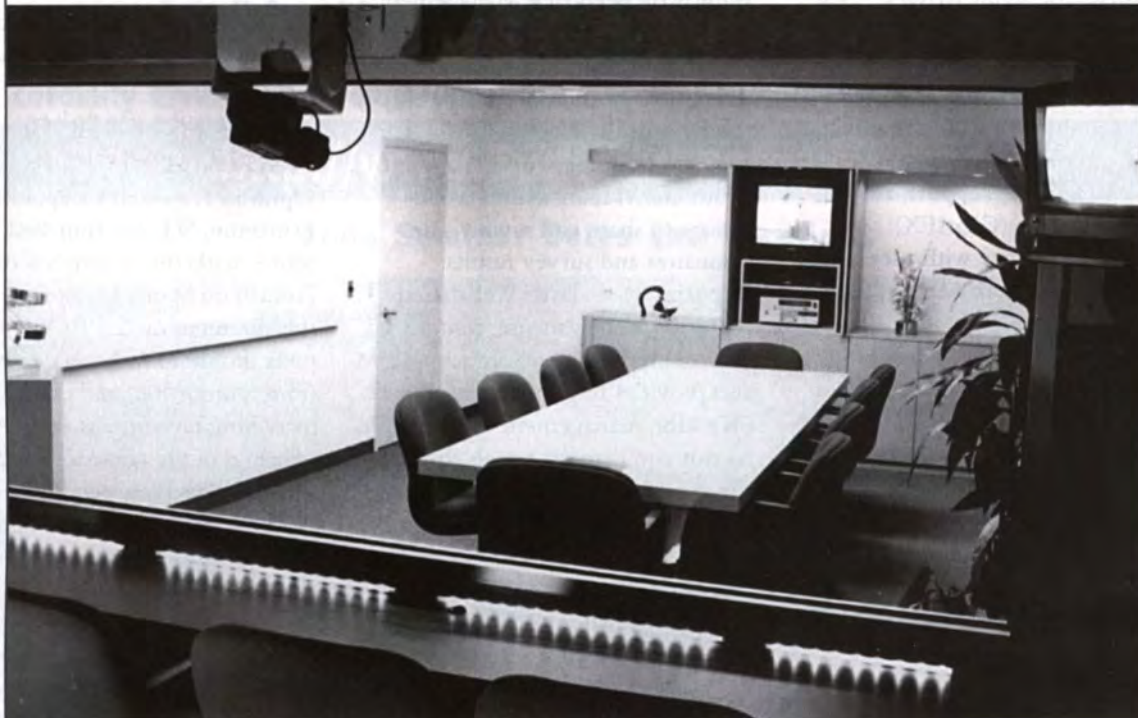
Eating habits have become more expansive as consumers become better traveled, better educated, and more likely to want to experiment with a wide array of cuisines. Specialty foods, products that have limited distribution and a reputation for high quality, have been steadily gaining popularity as the American consumer has developed more sophisticated and discerning tastes. A number of factors have contributed to the growth in sales of specialty foods: globalization in the food industry, a greater interest in high-quality ingredients, and more disposable income devoted to non-discretionary food purchases. As well, a better-traveled consumer base has begun to seek out international foods in the United States, spurred by a general change in eating patterns that includes more away-from-home eating. Paralleling the trend for international foods is a greater interest in regional American cuisines, a result of more sophisticated domestic travelers. At the same time, a more robust distribution network makes it possible to buy specialty foods in a myriad of venues.

Specialty foods are noted for the fact that they are almost universally

higher in price than their non-specialty counterparts. In all but three segments, percentage-point increases in sales of specialty SKUs top those of all SKUs, suggesting that specialty food products are selling at a quicker pace than products in general. Overall, sales of specialty foods increased over 20 percent between 2001 and 2003 and the market is now valued at nearly \$23 billion. Condiments comprise more than an 11 percent share of the overall specialty foods market, making it the largest segment by a considerable degree – the next biggest segments, teas and cheese/cheese alternatives, each account for only about 5 percent of the market. Some segments have grown significantly between 2001 and 2003. For example, sales of specialty milk, half and half, and cream increased by 48 percent during that time period as more products from small dairies came to market. Similarly, sales of specialty eggs, including free range and exotic eggs, increased 43.3 percent between 2001 and 2003. The introduction of more specialty foods into the market, and the growing channels in which consumers can find these products, have both contributed to the increases in sales.

The NASFT State of the Specialty Food Industry is a joint research project prepared by Mintel International Group and SPINS, a San Francisco provider of information on natural products sales. The research encompasses three years of sales data (2001-2003) for 36 specialty food segments, pulled from the SPINS database of mainstream and natural food stores. In addition, Mintel surveyed 448 specialty food manufacturers, importers, distributors and brokers, plus 349 specialty food retailers to develop the statistics presented in the report. For more information visit www.specialtyfood.com or www.mintel.com.

PAMPER YOUR CLIENTS



CONSUMER SURVEYS COMPANY IN CHICAGO, WHEN YOU DEMAND EXCELLENCE

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

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



Consumer Surveys Company

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

Product and Service Update

continued from page 12

ing of ON, OFF and FLIP commands, allowing easier selection of categories for script writers.

Version 3.10-00 of Pulsar Web, the firm's Web reporting and analysis package, includes

enhancements/new features such as: a new interface and logos; SPSS MR Data Model (2.8) support; a new charting engine (ChartFX); customizable interface with user levels; and direct export to Microsoft Excel.

Bellview CAPI 5.00-17, Pulse Train's personal interviewing system, includes: a new BVCAP.INI parameter; additional features in PLG; a supervisor report displaying unread e-mails; ability to use DEL files to automatically delete sample; and disabling of CTRL+ALT+DEL. For more information visit www.pulsetrain.co.uk.

Ziment tool aims to improve accuracy of primary pharma research

New York research firm Ziment has introduced demand calibration, a research technique for pharmaceutical manufacturers that is designed to improve the accuracy of the primary marketing research used to help build sales and manufacturing forecasts. The new technique will allow for the proper input of customer demand into these forecasts, historically a weak point in the process.

Demand calibration is an algorithm that properly adjusts what is called preference share, the extent to which customers say they will prescribe or use a new product, to a better representation of what will be their actual prescription or use of the product. The algorithm was developed by examining Ziment's primary research study database formed over 20 years, and comparing preference shares from these studies to the actual performance, in market, of the products that were researched. For more information visit www.ziment.com.

Perseus application supports multiple workgroups

Braintree, Mass.-based software firm Perseus Development Corporation has released Perseus SurveySolutions Enterprise Feedback Management (EFM), a Web-based application that allows enterprise managers to centrally manage and control the survey practices of their organization. It supports multiple workgroups and allows individuals within workgroups to share and review questionnaires and survey results. Importantly, it allows Web-based reporting from a secure, centralized environment. SurveySolutions/EFM also provides respondent panel and invitation management so users can recruit and manage panels through the use of various demographic registration surveys. Surveys can also be created and deployed in multiple languages. The system is fully compatible with Microsoft Office and requires no desktop software. For more information visit www.perseus.com.

Time Series Research Package from GeoLytics

GeoLytics is now offering its Time Series Research Package, which includes all of GeoLytics' CensusCD products along with its normalized datasets. The upgraded Research Package includes: the complete Research Package on three DVDs; updated and improved census tract, block group, and block boundaries; and an upgraded version of the Map Viewer.

The DVDs are as follows: Disk 1 (Historic Data): CensusCD 1970 Long Form, 1980 Long Form, 1990 Long Form, and 1990 Short Form Blocks. Disk 2 (2000 Short Form & Redistricting): CensusCD 2000 Short Form, 2000 Short Form Blocks, 2000 Redistricting, and 2000 Redistricting Blocks. Disk 3 (Normalized Data): CensusCD 2000 Long Form, Census CD 1990 Long Form in 2000 Boundaries, and the Neighborhood Change Database.

The new DVD upgrade includes revised census tract, block group and

block boundaries. The improved boundaries decrease the splintering of files exported into ArcView and MapInfo. There is also an updated version of the map viewer for examining enhanced tract and block group boundaries. For more information visit www.us-census-data.com.

ORC debuts model to measure sports ROI

Opinion Research Corporation, Princeton, N.J., has launched a new sports marketing research tool: the Return on Sports Investment (ROSI) measurement model. ROSI, which gives insight into the value derived from sponsorships and other sports marketing investments, rounds out the offerings of the company's full-service ORC Sports Research Desk.

Through an integrated approach of diagnostics and analysis, the ROSI model is designed to go beyond measures like brand awareness and media impressions to provide quantifiable data on measures like active customers, share of wallet and sales. The result is information that sports marketers can use to determine which programs impact equity and sales, to communicate effectively with the right audience and to maximize effectiveness and profitability overall. For more information visit www.opinionresearch.com.

Confirmit gets an update

Oslo-based FIRM has released version 8.5 of its Confirmit online survey and reporting software. Confirmit v8.5 includes a new survey engine built on Microsoft .NET technology and a new version of its reporting platform, Reportal. With Reportal, users can define a master report and provide end users with their own personalized report on the Web or in PowerPoint and Excel formats. New functionality also includes definition of weight models, significance testing and banner (cross-break) definition for comprehensive crosstabulations. For more information visit www.confirmit.com.

Marketing Research/Decision Support Seminars from...

THE BURKE INSTITUTE

We cordially invite you to experience our unequalled commitment to excellence.

<http://www.BurkeInstitute.com>

2004 Seminar Dates and Locations

101. Practical Marketing Research

New YorkJan 6-8
DallasFeb 9-11
Los AngelesMar 15-17
ChicagoApr 12-14
BostonMay 24-26
San FranciscoJune 28-30
New YorkAug 2-4
CincinnatiSep 8-10
BaltimoreOct 11-13
ChicagoNov 16-18

104. Designing Effective Questionnaires: A Step by Step Workshop

New YorkJan 20-22
Los AngelesMar 23-25
BaltimoreJune 1-3
San FranciscoJuly 27-29
CincinnatiSep 14-16
ChicagoDec 7-9

106. Tools & Techniques for Conducting Online Research

New YorkMar 2-3
ChicagoJune 8-9
Los AngelesNov 4-5

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

ChicagoJuly 13-14

202. Focus Group Moderator Training

CincinnatiJan 27-30
CincinnatiMar 16-19
CincinnatiMay 4-7
CincinnatiJune 22-25
CincinnatiAug 10-13
CincinnatiSep 28-Oct 1
CincinnatiNov 16-19

203. Specialized Moderator Skills for Qualitative Research Applications

CincinnatiFeb 2-5
CincinnatiJune 28-July 1
CincinnatiOct 4-7

205. Qualitative Research with Children

ChicagoJuly 15

301. Writing and Presenting Actionable Marketing Research Reports

New YorkJan 14-16
ChicagoApr 21-23
Los AngelesJuly 21-23
CincinnatiOct 20-22

501. Applications of Marketing Research

DallasFeb 12-13
Los AngelesMar 18-19
BostonMay 27-28
New YorkAug 5-6
BaltimoreOct 14-15

502. Product & Service Research

New YorkMar 2-3
ChicagoSep 21-22

504. Advertising Research

New YorkMar 4-5
ChicagoSep 23-24

505. Market Segmentation Research

New YorkFeb 24-25
Los AngelesJuly 13-14
ChicagoNov 2-3

506. Customer Satisfaction Research

New YorkFeb 17-18
CincinnatiJune 8-9
ChicagoOct 26-27

507. Analysis and Interpretation of Customer Satisfaction Data

New YorkFeb 19-20
CincinnatiJune 10-11
ChicagoOct 28-29

508. Positioning Research

New YorkFeb 26
Los AngelesJuly 15
ChicagoNov 4

509. Pricing Research

New YorkFeb 27
Los AngelesJuly 16
ChicagoNov 5

601. Data Analysis for Marketing Research: The Fundamentals

New YorkJan 12-13
ChicagoApr 19-20
Los AngelesJuly 19-20
CincinnatiOct 18-19

602. Tools and Techniques of Data Analysis

New YorkJan 27-30
Los AngelesMar 30-Apr 2
BaltimoreJune 15-18
ChicagoAug 17-20
DallasOct 5-8
CincinnatiNov 30-Dec 3

603. Practical Multivariate Analysis

New YorkFeb 3-6
Los AngelesApr 5-8
BaltimoreJune 22-25
ChicagoAug 24-27
San FranciscoOct 19-22
CincinnatiDec 7-10

605. Practical Conjoint Analysis and Discrete Choice Modeling

CincinnatiApr 13-14
ChicagoJuly 8-9
Los AngelesOct 27-28

701. Conducting Research in International Markets

New YorkMar 4-5
Los AngelesNov 4-5

© 2003 The Burke Institute

Please Check our website or contact us about the following:

- Certificate Programs
- Pass Programs (3, 6, 12 month options—save \$1000's)
- In-house/onsite seminars
- Combination/team fees
- Recommended seminar combinations: 101 & 501, 201 & 205, 202 & 203, 301 & 601, 502 & 504, 505 & 508, 506 & 507, 508 & 509, 602 & 603

TO REGISTER PLEASE CONTACT US AT:

Voice: 800-543-8635 or 513-684-4999 • Fax: 513-684-7733
E-mail: Linda.Thomson@BurkeInstitute.com

FOR ADDITIONAL INFORMATION OR DETAILS ABOUT OUR SEMINARS:

Please contact Mr. Jim Berling, Managing Director,
or visit our web site at <http://www.BurkeInstitute.com>

Program lets firms brand survey software

Boston-based research software firm Key Survey has launched its Private Label Partner Program, which is designed to allow any research or consulting firm to brand Key Survey technology as its own while Key Survey manages and hosts the application on its server. In addition to using the application to deploy surveys, private label partners can also sell their own online survey subscriptions under their own brand. For more information contact Cal Brown at 781-849-8118 or visit www.keysurvey.com.

Firms team to create new online research tool

Three firms, eBrain Market Research, Estco Medical, and Liquid Marketing and Insight, have created imprint, a new online research and communications tool. Imprint combines traditional research method-

ologies with an interactive interface to replicate real-world focus groups and in-depth interviews online. The differentiator of the imprint tool is its interface. The online imprint research facility is fully graphical. Participants are represented by animated, human-looking characters (which they choose themselves), and have the ability to express things such as laughter, surprise or confusion. Moderators can engage participants with questions, as well as use the technology to demonstrate a variety of exhibit types. Clients can watch the group as it unfolds and have ongoing and immediate access to the moderator as well as other clients. For more information visit www.imprintresearch.com.

New facilities

Research firm the Martec Group has opened a new location at 1445 North Rd., Green Bay, Wis., 54313. Phone 920-494-1812. Fax 920-494-3598. The new facility features

a telephone data collection center, a data processing center, a test kitchen and a focus group suite.

Briefly...

AllPoints Research Inc., Winston-Salem, N.C., has formed a new Hispanic data collection division. It will offer bilingual questionnaire design, Web-based surveys and telephone interviewing. For more information visit www.allpointsresearch.com.

Dallas-based Mobile Memoir is now offering a Web extension enabling the company's Mobile Memoir software, which supports surveys taken over a variety of wireless devices, to connect to conventional PCs. Researchers may utilize any or a combination of devices for data collection. For further information visit www.mobilememoir.com.

Richard K. Miller & Associates, Norcross, Ga., is now offering the 2004 Entertainment, Media and Advertising Market Research Handbook. Now in its sixth edition, the book has been expanded to 62 chapters and offers an assessment of the media and advertising markets, including television, radio, newspapers, video games, sports marketing, licensing and sponsorships. For more information visit www.marketresearch-handbooks.com.

The NPD Group, Port Washington, N.Y., has launched the NPD Consumer Electronics Price Watch, a monthly pricing monitor that provides a top-line look into the average selling price of technology products being sold in the U.S. The pricing monitor is based on a market basket of the most frequently purchased electronic products, including televisions, PCs, cameras and media players. For more information visit www.npd.com.

A RECRUITING COMPANY THAT YOU
CAN CALL YOUR PARTNER...

TODD BIEDERMAN INTRODUCES
you to the Advanced Focus team:



TOP ROW, L to R: BRADLEY SOLOMON • TIM RUIZ •
TODD BIEDERMAN
FRONT ROW, L to R: DEBRAH GALIMOI • KAREN LOUIS

*Advanced
Focus*
Market Research Services

38 east 29th street • Suite 7FN • New York, NY 10016
Phone #: 212.217.2000 Fax #: 212.217.2007

www.advancedfocus.com

Webbed Feat.

We did it. The greatest data collection achievement of the 21st Century.

OAC is now providing Hybrid Data Collection™ - Web/Phone Surveys.

No more ducking the hard question... "*Should I do a telephone survey or a web survey?*" We eliminate the guesswork and the limitations. Basically, we just make your job easier. We continue to skillfully deliver accurate, reliable data, on time and within budget, and now we offer the choice of the web. With our TelAthena software, the data collection process is seamless whether by phone or by web, or both at the same time.

No other company in the industry offers this. And we have perfected it.

So now you can have all your ducks in a row whether you start your project by phone to web, or web to phone, or all phone or all web... either way, any way, even all at the same time.

**We're OAC—Opinion Access Corp.
We hear you.**

Hybrid Data Collection™

Telephone Interviewing

Data Management

Data Processing

Data Collection

CATI System

Predictive Dialing

Bi-lingual Capabilities



Research Industry News

continued from page 15

Awards/rankings

WebSurveyor Corporation,

Herndon, Va., has won a Stevie award from the American Business Awards. WebSurveyor 4.1 was named best new product within the computer software category. Stevie awards recognize outstanding business leadership, innovation, perseverance, creativity, teamwork and integrity through more than 40 categories.

New accounts/projects

New York-based **Arbitron Inc.** has signed **Sporting News Radio** as a new radio network provider for the company's RADAR network radio ratings service. RADAR will report Sporting News Radio effective with the RADAR 82 release on October 4, 2004. Sporting News Radio, targeting men 25-54, will offer one program per daypart Monday-Sunday for a total of 35 minutes or 70 thirty-sec-

ond, weekly commercial units. Sporting News Radio is the first standalone sports-talk network to become a RADAR client. Its addition will bring the current count of RADAR-rated networks to 41.

The PGA Tour has selected **Scarborough Sports Marketing**, New York, for consumer and fan research services. Through the agreement, the Tour will utilize Scarborough's Multi-Market database, a study of consumer shopping, media and lifestyle behaviors in the 75 local markets Scarborough measures, to aggregate information across local markets and perform consumer and fan analyses.

Brass Craft, a Novi, Mich., plumbing supply firm, has selected Clarkston, Mich.-based **Intellitrends LLC** to survey its customer base to identify ways to maximize customer service.

New companies/new divisions/relocations/expansions

Cincinnati-based **Sigma: Research Management Group** has expanded into southeastern Michigan to service its clients in the Detroit area. Paul Johnson has been named senior research executive and will manage the new operation.

St. Joseph, Mich.-based research firm **Smith-Dahmer Associates** has opened an office at 1128 Harmon Place, Minneapolis, Minn., 55403. Phone 612-746-0556. Fax 612-746-0558. The office will be managed by Regional Director Laura Holderness.

New York-based **MarketResearch.com**, an online aggregator of market research reports, has opened an office in London to support its European customers. The office will be managed by PowerInfo Ltd. of London, a European business development and marketing agency.

Paris-based **Ipsos** has added a new global division, Ipsos Loyalty, which will provide customer satisfaction measurement and customer relationship management services.

Market Segment Research has moved to Colonnade Corporate Center, 2332 Galiano St., Coral Gables, Fla., 33134. The new telephone number is 305-728-7115. The new fax is 305-728-7116.

Company earnings reports

For the first quarter ended March 31, 2004, New York-based **NetRatings, Inc.** reported revenues of \$13.3 million, a 47 percent increase over revenues of \$9.0 million in the first quarter of 2003. Revenue growth reflected additional sales of existing Nielsen//NetRatings products and the integration of acquisitions made during 2003.

In accordance with generally accepted accounting principles (GAAP), net loss for the first quarter of 2004 was \$6.5 million, or (\$.19) per share, on approximately 34.1 million shares. This compares with a net

CFMC

COMPUTERS for MARKETING CORPORATION

Serving
the marketing
research industry
since 1967.

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

WebSurvent
Survent
SoundSurvent
Mentor
COSI
Script Composer

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

San Francisco: (415) 777-0470
New York: (212) 777-5120
Denver: (303) 860-1811
London: (0) 20 7665 6627



Turn the boom in online research into a recurring revenue goldmine!

Sign up now for the Key Survey Private Label Partner Program.

Go after the fastest growing segment of the research industry by branding and reselling Key Survey technology into your own vertical market.

What is our Private Label Partner Program? How does it work and why did we create it?

We created this Partner Program for you. Unless you're a top-ten international you cannot afford to build or maintain your own online survey application. Yet it's estimated that half of all research will go online next year!

So what are your choices? Clearly, you must choose a long term technology partner to be successful. We want to earn this privilege. Our "industry first" Partner Program let's you configure and deploy your own Private Label version of Key Survey alongside your current research services and reach this huge growth market immediately.

Start profiting today from the huge demand for a "Do-It-Yourself" survey tool.

In addition to selling your professional research services, you'll now have two new revenue streams. Sell subscriptions to your own Company Brand online survey application from your own website at \$690 to \$2,500 each per year. Plus, with Key Survey's new powerful API capability, you'll have opportunities to sell complete Enterprise solutions (\$20,000 and up).

Partner Program Benefits

- Your Company Brand Private Label application fully customized – including your own domain name.
- New customers for your professional research services.
- Recurring subscription revenue.
- Leads and referrals from participation in Key Survey marketing programs.
- Your company featured on Key Survey's site with a direct link to your homepage (optional).
- Live Online technical support including a dedicated "Partners only" support hotline.
- No technology worries. Everything is hosted and supported by Key Survey behind the scenes.
- Fast Start Partners Training program.
- Low cost. No overhead. Minimum risk.

Private Label more than you need? Ask about our Associate Partner Program. Call 817 491 2450

Upsell your new customers.

An amazing number (almost 40%) of companies who purchase an online survey subscription would like help creating their survey. A clear opportunity for a market research company like yours! Without question a number of subscribers will convert to "client status" as a result of first buying a subscription from you.

Worldwide Internet Research Revenues, 2001-2003 (in millions and % growth)

2001	\$621 (33%)
2002	\$834 (27%)
2003	\$993 (19%)

Source: Inside Research, 2003; BMRA, April 2003

Build a growing base of recurring revenue.

Online survey subscribers renew. Each year this revenue grows like any annuity – guaranteeing you a solid revenue base regardless of economic conditions.

Partner with the only major online research player that does not compete with you.

Key Survey is not in the research business. We offer no professional research services. You'll never find us competing with you for research projects. In fact, the opposite is true. When we get requests for professional services, we always refer them to those partners with matching vertical market competencies. In contrast, all of our competitors aggressively promote their own professional research services – in direct competition with you. Your best long-term partner? We'll let you decide.

What should you do next?

Call Jim Hatcher now. He'll explain all your options in detail. Sign up for our Partner Program before June 30th and qualify for a \$1,000 discount off our standard Private Label Partner Program pricing. Call now!

Call Jim Hatcher: 817 491 2450
email: jim.hatcher@keysurvey.com

KeySurvey

We partner. We don't compete.



Learn more – visit
www.keysurvey.com

loss of \$5.2 million, or (\$0.15) per share, in the first quarter of 2003, on approximately 33.6 million shares.

On an EBITDA basis, the company reported a first quarter loss of \$3.1 million, or (\$0.09) per share. This compares with an EBITDA loss in the first quarter of 2003 of \$2.8 million, or (\$0.08) per share. Cash, cash equivalents and short-term investments at the end of the first quarter were \$198 million, compared to \$210 million at the end of 2003, reflecting cash usage from operations and the acquisition of the balance of RedSheriff.

The company reported a 76 percent global renewal rate for the first quarter of 2004 (excluding RedSheriff clients), up from 72 percent during the first quarter of 2003, and signed or renewed contracts with companies including aQuantive, CareerBuilder.com, Deutsch, Dow Jones Interactive, Forbes.com, Google, Modem Media, Tiscali and U.S. News and World Report. With the integration of the RedSheriff acquisition, NetRatings now has more than 1,166 clients globally.

Survey Sampling International, Fairfield, Conn., announced that sales in the first quarter of 2004 increased by 47 percent over Q1 2003. March sales set a new company record. Sales

of eSample were 60 percent of total sales, up from 50 percent for Q1 2003. Global telephone sales increased 20 percent. RDD sample sales increased almost 5 percent. And 46 new accounts were opened and 62 accounts were reactivated.

The first quarter of 2004 was successful for the Germany-based **GfK Group**, with a 10.5 percent increase in sales to EUR 149.9 million. With an increase of almost 64 percent to EUR 15.0 million, EBIT after income from participations again rose much more strongly than sales. In the first quarter of 2004, the margin increased to 10 percent (compared to 6.7 percent in the same period in the previous year). The stronger rise in EBIT than in sales resulted both from organic growth and from acquisitions. Consolidated total income increased by almost 52 percent. Net of tax of EUR 5.4 million and the share of consolidated total income attributable to minority interests of EUR 2.2 million, consolidated total income amounted to EUR 6.9 million.

Paris-based **Ipsos** posted first-quarter 2004 revenues of EUR 127.1 million, up 7.2 percent compared with the same period of last year. At comparable structure and at constant

exchange rates, the group's quarterly revenues increased by 8.9 percent, a higher rate than during the year-earlier period.

For the second quarter in a row, Europe posted significant organic growth (7 percent). In North America, organic growth came to 8 percent, reflecting the consolidation of business. Latin America posted 14 percent organic growth. The strongest rate of organic growth (33 percent) was posted in Asia-Pacific and the Middle East, which doubled the size of their contribution to group revenues from 3 percent to 6 percent. China posted organic growth of 90 percent, but this figure should be kept in perspective since its first quarter 2003 revenues were depressed by the SARS epidemic.

Revenues for the first quarter ended March 31, 2004 at **Opinion Research Corporation**, Princeton, N.J., were \$48.0 million versus \$43.2 million in the prior year's first quarter, an increase of 11 percent. Social research revenues were \$30.9 million versus \$27.8 million in last year's first quarter. Market research revenues totaled \$13.4 million versus \$12.0 million in the prior year's first quarter. Teleservices revenues were \$3.6 million versus \$3.4 million in last year's first quarter. Market research revenues were favorably impacted by \$0.8 million due to the depreciation of the U.S. dollar relative to other currencies.

Operating income for the first quarter was \$3.4 million, versus \$2.4 million in last year's first quarter, an increase of 40 percent. Net income for the first quarter was \$0.9 million, or \$0.15 per diluted share, versus net income of \$0.7 million, or \$0.12 per diluted share in last year's first quarter, increases of 28 percent and 25 percent respectively. Net income growth lagged operating income growth due to the income tax provision, which is adversely affected as the company is not providing tax benefits on state and non-U.S. losses. Cash flow was used to further reduce debt by \$1.7 million during the quarter.

FOCUS GROUPS/ CLEVELAND SURVEY CENTER

Established in 1962

**Three Large Suites Multi-Purpose Room
Multiple T1 Lines in all Suites
Litigation Research, Medical, Consumer,
Product Placement, Taste Tests,
Pre-Recruits, Videoconferencing, On-Site
Excellent Recruiting - Project Management
We are the only centrally located facility serving all
parts of greater Cleveland/Akron & vicinity**

Call: 800-950-9010 or 216-901-8075

Fax: 216-901-8085 or 216-642-8876

Web: www.focusgroupsofcleveland.com

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



Jeff Anderson Consulting

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

AutoPacific

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



C&R Research Services, Inc.
500 N. Michigan Ave. 12th fl.
Chicago, IL 60611
Ph. 312-828-9200
Fax 312-527-3113
E-mail: info@crresearch.com
www.cr-research.com
Contact: Megan Burdick
Leading Supplier Of Qual. Rsch. In The U.S. With Over 40 Yrs. of Experience. Latino/Gen. Consumer/Kids/50+ Age Segment/B2B.

C.L. Gailey Research
347 La Mesa Avenue
Encinitas, CA 92024
Ph. 760-436-1462
Fax 760-436-5384
E-mail: clgailey@cox.net
Contact: Carol Gailey
Full-Service Qualitative and Quantitative Research.



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

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

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



Consumer Dynamics and Behavioral Analysis, LLC
8 Goodale Road
Newton, NJ 07860-2782
Ph. 973-383-7028
Fax 973-383-6058
E-mail: lzaback@cdandba.com
www.cdandba.com
Contact: Larry A. Zaback
Strategically Focused, Actionable Consumer Insights. Proprietary Behavioral Research Techniques.

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

The Consumer Network, Inc.
P.O. Box 42753
Philadelphia, PA 19101
Ph. 215-235-2400
Fax 215-235-6967
E-mail: mona@consumernetwork.org
Contact: Mona Doyle
Mona Uses Anthropology, Consumer Advocacy, and Marketing Skills To Get To Changes That Grow Sales.

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

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

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



Doyle Research Associates, Inc.
400 N. Michigan Ave., Suite 800
Chicago, IL 60611
Ph. 312-863-7600
Fax 312-863-7601
E-mail: info@doyleresearch.com
www.doyleresearch.com
Contact: Kathy Doyle
Est. 1986; 6 Moderators; Full-time Field Staff. Focus Grps. (Face-to-Face/Phone/Online), Ethnographic/Observational Rsch./Idea Generation/ Rsch./Ideation with Kids/Teens; New Prod. Dev., Adv.

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

Erlch Transcultural Consultants
11430 Burbank Blvd.
North Hollywood, CA 91601
Ph. 818-623-2425
Fax 818-623-2429
E-mail: info@etcethnic.com
www.etcethnic.com
Contact: Andrew Erlch, Ph.D.
Full Svc. Latino, Asian, African-Amer, Amer. Indian Mktg. Rsch.



Fader & Associates
372 Central Park W., Ste. 7N
New York, NY 10025
Ph. 212-749-3986
Fax 212-749-4087
E-mail: info@faderfocus.com
www.faderfocus.com
Contact: Linda Hu
Broad Range of Categories & Demographics Experience With All Size Clients. U.S. & International Experience
Excellent Strategic/Analytical Skills.

Fine Research & Marketing, Inc.
431 N. Grandview Ave.
Daytona Beach, FL 32118
Ph. 386-253-0809
Fax 386-253-7272
E-mail: RsrchPro@aol.com
Contact: Evelyn Fine
30+ Years of Domestic/
International Qualitative
Experience. Creative and Flexible.



MARKET INSIGHTS

Flake-Wilkerson Market Insights, LLC
333 Executive Court, Suite 100
Little Rock, AR 72205
Ph. 501-221-3303
Fax 501-221-2254
E-mail: kflake@mktinsights.com
www.mktinsights.com
Contact: Karen Flake
Intuitive, Creative & Detailed. 15 Years of Experience.

FOCUS LATINO

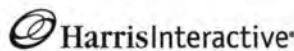
Focus Latino
1617 Cabinwood Cove
Austin, TX 78746
Ph. 512-306-7393
Fax 512-328-6844
E-mail: gcafocuslatino@austin.rr.com
Contact: Guy Antonoli
Contact: Beatriz Noriega
Established 1996. Specialize in Qualitative Hispanic Consumer Research. Bilingual & Bicultural, Moderate in Spanish & English.



FOCUSED Marketing Research, Inc.
P.O. Box 290
Bedminster, PA 18910-0290
Ph. 215-795-0900
Fax 215-795-0909
E-mail: vpd@focusedmr.com
www.focusedmr.com
Contact: Vern Dougherty
Insightful Analysis & Actionable Reports. Consumer, B-to-B, Internet, Rx & Pet Products. Call Us Today!

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

Galloway Research Service
4751 Hamilton Wolfe
San Antonio, TX 78229
Ph. 210-734-4346
Fax 210-732-4545
E-mail: grs@gallowayresearch.com
www.gallowayresearch.com
Contact: J. Patrick Galloway
Creative/Energetic/Experienced.
State-of-the-Art Facility with Large Viewing Rooms/Client Lounges/ Offices/Restrooms w/ Showers. T-1/VideoStreaming/On-site Personnel.



Harris Interactive
135 Corporate Woods
Rochester, NY 14623
Ph. 800-866-7655
Fax 585-272-8680
E-mail: info@harrisinteractive.com
www.harrisinteractive.com
Contact: Jim Longo
Offering Online & In-Person Qualitative Research.

Herrera Communications
28751 Rancho California Road
Suite 206
Temecula, CA 92590
Ph. 909-676-2088
Fax 909-676-2996
E-mail: info@herrera-communications.com
www.herrera-communications.com
Contact: Dolores Herrera
Bilingual Moderators. Nationwide Latino Recruitment.



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



IMR-Innovative Media Research
2 Hudson Place, 3rd floor
Hoboken, NJ 07030
Ph. 201-356-1900
Fax 201-356-1910
E-mail: franyoung@imresearch.com
www.imresearch.com
Contact: Frances Young
Moderating Specialists in Healthcare Research.



In-Depth: Technology Market Rsch.
2090 Vistazo East
Tiburon, CA 94920
Ph. 415-789-1042
Fax 415-789-0366
E-mail: jacob@in-depthresearch.com
www.in-depthresearch.com
Contact: Jacob Brown
Premier Provider of Custom Market Research to Technology Companies. Focus Groups, Online Surveys, Web Site Usabilities, International Capabilities.

innovation Management
125 Timberhill Place
Chapel Hill, NC 27514
Ph. 919-933-4676
Fax 919-933-7115
info@innovationmanagement.com
www.innovationmanagement.com
Contact: Kevin Leibel
Insightful Qualitative Services from a Preferred Vendor of Coca-Cola, Quaker, Frito-Lay, Sunbeam. Food, Beverage, Packaging, Kids, Seniors.



Insights Marketing Group, Inc.
2512 Swanson Ave.
Miami, FL 33133
Ph. 305-854-2121
Fax 305-854-2130
E-mail: belkist@insights-marketing.com
www.insights-marketing.com
Contact: Belkist E. Padilla, Pres.
Contact: Gloria Cantens, Dir. Qual. Rsch.
Full-Service Qualitative Research. Experienced in Multicultural. Better Thinking, Better Qualitative.



Just The Facts, Inc.
P.O. Box 365
Mt. Prospect, IL 60056
Ph. 847-506-0033
Fax 847-506-0018
E-mail: facts2@interaccess.com
www.justthefacts.com
Contact: Bruce Tincknell
Highly Skilled; Well Organized; Maintains Control While Enabling Creative Flow; Strategic Moderating; Actionable Results; 25 Years Experience.



Karchner Marketing Research
202 Paperbirch Drive
Collegeville, PA 19426
Ph. 610-489-0509
Fax 610-489-6939
E-mail: mgkarchner@comcast.net
Contact: Mike Karchner
Consumer, Business & Medical Audiences. Specializing in Retail, Pharmaceutical & Financial Services.

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



Leichliter Ascts. Mkt. Rsch./ Idea Development
P.O. Box 788 FDR Station
New York, NY 10150-0788
Ph. 212-753-2099
Fax 212-753-2599
E-mail: lleichliter@aol.com
www.leichliter.com
Contact: Betsy Leichliter
Targeted Focus Grps./Interviews/ Usability Rsch./Team Facilitation. Face-to-Face/Phone/Internet. Based: NYC & Chicago, Nat'l./Global Capabilities. Free Initial Consultation.

Loretta Marketing Group
13935 S.W. 102 Court
Miami, FL 33176
Ph. 305-232-5002
Fax 305-232-8010
E-mail: limg8010@bellsouth.net
Contact: Jim Loretta
U.S. Hispanic/Latin Amer. Consumer Rsch. 25 Yrs. Exp. Bilingual/Bicultural. Born in Mexico/Educated in the U.S.



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

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

Markets in Motion
215 Eagles Circle
Alpharetta, GA 30004
Ph. 678-908-1913
E-mail: sally.markham@comcast.net
Contact: Sally Markham
Prod. Dev., Cust. Sat., Comm. Test, 20+ Yrs. Pkged Goods, Healthcare, HomeBldrs, B2B, Drs., SRS, Realtors, HOH.

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

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

Media-Screen
27 Mirabel Ave.
San Francisco, CA 94110
Ph. 415-647-2876
Fax 415-723-8823
E-mail: cate@media-screen.com
www.media-screen.com
Contact: Cate Rieger
Focus Groups, 1-on-1s, Online Focus Groups, Ethnography.

MedProbe® Inc.
13911 Ridgedale Dr., Suite 400
Minneapolis, MN 55305
Ph. 952-540-0718
Fax 952-540-0721
E-mail: MedPr@aol.com
Contact: Asta Gersovitz, Pharm.D.
MedProbe® Provides Full
Qualitative & Advanced
Quantitative Market Research
Including SHARECAST &
SHAREMAP.


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

Mountain Insight, LLC
8185A Summerset Dr.
Colorado Springs, CO 80920
Ph. 719-522-0323
Fax 719-522-0319
E-mail: emotz@mountaininsight.com
www.mountaininsight.com
Contact: Eulee Motz
Design, Moderation, Analysis of In-
Person & Telephone Focus Groups
& Depth Interviews. Experienced
Professionals.

The New Marketing Network, Inc.
225 W. Ohio St., Suite 600
Chicago, IL 60610
Ph. 312-670-0096
Fax 312-670-0126
E-mail: info@newmarketingnetwork.com
www.newmarketingnetwork.com
Contact: Priscilla Wallace
Creative Director, Now A Strategic,
Results-Oriented Moderator.

OTIVO, INC.
451 Hayes Street
San Francisco, CA 94102
Ph. 415-626-2604
Fax 415-626-2605
E-mail: lwaldal@otivo.com
www.otivo.com
Contact: Leanne Waldal
Web Sites, Hardware, Software,
Gadgets, Wireless.

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



Primary Insights, Inc.
650 Warrenville Rd., Ste. 301
Lisle, IL 60532
Ph. 630-963-8700
Fax 630-963-8756
E-mail: info@primaryinsights.com
www.primaryinsights.com
Contact: Elaine Parkerson
Sensitive Topics, Ideation, Exploration
for Strategic Decision Making.
Action-Oriented Recommendations.

PRYBYL Group, Inc.
2349 N. Lafayette St., Ste. 1200
Arlington Heights, IL 60004
Ph. 847-670-9602
E-mail: mjrichards@prybylgroup.com
www.prybylgroup.com
Contact: Marilyn Richards
3,000 Focus Groups and IDI's
Successfully Conducted. Challenging
and Short Notice Projects Welcomed.

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

Research Goddess Consulting
12544 Eliot Street
Broomfield, CO 80020
Ph. 303-868-2533
E-mail: statsmarketing@aol.com
Contact: Tiffany Pereda
Riva-Trained with 10 Years of
Experience. B2B, B2C &
Physicians. Superior, Cost-Effective
Results.

RIVA Market Research
7316 Wisconsin Ave., Suite 450
Bethesda, MD 20814
Ph. 301-652-3632
Fax 301-907-0209
E-mail: Research@RIVAinc.com
www.RIVAinc.com
Contact: Amber Marino Tedesco
Full-Service Qualitative Company
With 20+ Years Experience.
Considered Industry Leader in
Moderating & Training.



Pamela Rogers Research, LLC
2759 Fourth St.
Boulder, CO 80304
Ph. 303-443-3435
Fax 303-443-3621
E-mail: pamelarogers@aol.com
www.pamelarogersresearch.com
Contact: Pamela Rogers
Exceptional Insights Since 1985;
U.S., International, Online.

Jay L. Roth & Associates

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



Paul Schneller Qualitative LLC
300 Bleecker St.
New York, NY 10014
Ph. 212-675-1631
www.gls.net/~answers
Contact: Paul Schneller
Full Array: Ads/Packaged
Goods/Rx/Bus.-to-Bus./Consumers.
14+ Years Experience.

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

Strategic Directions Group, Inc.
525 Lexington Pkwy. S., Suite 203
St. Paul, MN 55116
Ph. 651-228-7250
Fax 651-228-7260
E-mail: cmorgan@strategicdirec-
tionsgroup.com
www.strategicdirectionsgroup.com
Contact: Carol M. Morgan, Pres.
Since 1989 We've Used Our
Innovative Quantitative Methods in
Focus Groups, Yielding Greater
Insights into Hidden Motivations for
Demanding Clients. B-to-B and
Consumer Experience.

Strategic Eye, Inc.
1709 Tenby Drive
Hershey, PA 17033
Ph. 717-520-9013
Fax 717-520-9015
E-mail: christy@strategiceye.com
Contact: Christy Stover
Strategic Moderating; Creative
Techniques; Actionable Results.



synovate

Research reinvented

Synovate
580 White Plains Rd.
Tarrytown, NY 10591
Ph. 914-332-5300
Fax 914-631-8300
E-mail: steve.wolf@synovate.com
www.synovate.com
Contact: Steve Wolf
Maximize The Power Of Your
Qualitative And Get The Clear,
Concise Results You Need For Real
Business Decision-Making.



Ten People Talking
3016 W. Raye St.
Seattle, WA 98199
Ph. 800-916-0775
Fax 206-216-0776
E-mail: regina@tenpeopletalking.com
www.tenpeopletalking.com
Contact: Regina Szyzkiewicz, MA
Expert Moderation. Strategic
Focus. 10+ Yrs. Experience. B2B,
Consumer & Healthcare.

Utilis

Research & Consulting

Utilis
966 St. Nicholas Ave., 2nd floor
New York, NY 10032
Ph. 212-939-0077
Fax 212-862-2706
E-mail: rperez@utilis-research.com
www.utilis-research.com
Contact: Raul Perez, Ph.D.
Full-Service, RIVA-Trained,
Experienced Moderators.
Psychology-based Approach.
Hispanic Specialty.



View-Finders Market Research
11 Sandra Lane
Pearl River, NY 10461
Ph. 845-735-7022
Fax 845-735-7256
E-mail: jgaines@view-finders.com
www.view-finders.com
Contact: Janet Gaines
Your Eye Into The Future.

Zebra Strategies
2565 Broadway - 393
New York, NY 10025
Ph. 212-860-7128
Fax 212-501-8401
E-mail: denene@zstrategies.net
Contact: Denene Jonielle
Full-Service Marketing Research.
Flawless Recruiting, Moderating,
Design, Nationwide. Expertise in
Consumer, B2B & Multi-Cultural
Research.

GEOGRAPHIC CROSS INDEX OF MODERATORS

Refer to preceding pages for address, phone number and contact name.

Arkansas

Flake-Wilkerson Market Insights, LLC

California

Jeff Anderson Consulting, Inc.
AutoPacific, Inc.
C.L. Gailey Research
Cheskin
Erlich Transcultural Consultants
Herrera Communications
In-Depth: Technology Market Research
Marketing Matrix International, Inc.
Meczka Mktg./Rsch./Cnsltg., Inc.
Media-Screen
OTIVO, INC.

Colorado

Cambridge Associates, Ltd.
Mountain Insight, LLC
Research Goddess Consulting
Pamela Rogers Research, LLC

Florida

Fine Research & Marketing, Inc.
Insights Marketing Group, Inc.
Loretta Marketing Group
SRA Research Group, Inc.

Georgia

Markets in Motion

Illinois

C&R Research Services, Inc.
Doyle Research Associates, Inc.
Just The Facts, Inc.
Leichliter Assoc. Mktg. Rsch./Idea Dev.
The New Marketing Network, Inc.
Primary Insights, Inc.
PRYBYL Group, Inc.

Maryland

RIVA Market Research

Massachusetts

Daniel Associates
Dolobowsky Qualitative Services, Inc.

Minnesota

Cambridge Research, Inc.

MedProbe™ Inc.
Millennium Research, Inc.
Outsmart Marketing
Strategic Directions Group, Inc.

New Jersey

Consumer Dynamics and Behavioral Analysis, LLC
Franklin Communications
Hispanic Research Inc.
IMR-Innovative Media Research
MCC Qualitative Consulting

New York

Decision Drivers
Fader & Associates
Harris Interactive
Knowledge Systems & Research, Inc.
Leichliter Ascts. Mkt. Rsch./Idea Dev.
Market Navigation, Inc.
The Research Department
Jay L. Roth & Associates, Inc.

Paul Schneller Qualitative LLC
Synovate

Utils
View-Finders Market Research
Zebra Strategies

North Carolina

D/R/S Health Care Consultants
innovation Management

Pennsylvania

The Consumer Network, Inc.
FOCUSED Marketing Research, Inc.
Karchner Marketing Research
Strategic Eye, Inc.

Texas

Consumer Focus LLC
Focus Latino
Galloway Research Service

Washington

Ten People Talking

SPECIALTY CROSS INDEX OF MODERATORS

Refer to preceding pages for address, phone number and contact name.

ADVERTISING

Jeff Anderson Consulting, Inc.
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Cambridge Research, Inc.
Decision Drivers
Doyle Research Associates, Inc.
Erlich Transcultural Consultants
Fader & Associates
Fine Research & Marketing, Inc.
Focus Latino
Insight Research Associates
Insights Marketing Group, Inc.
Millennium Research, Inc.
The New Marketing Network, Inc.
Outsmart Marketing
PRYBYL Group, Inc.
The Research Department
Pamela Rogers Research, LLC
Jay L. Roth & Associates, Inc.
Paul Schneller Qualitative LLC
View-Finders Market Research

AFRICAN-AMERICAN

Erlich Transcultural Consultants
Insights Marketing Group, Inc.
Zebra Strategies

AGRICULTURE

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

ALCOHOLIC BEV.

C&R Research Services, Inc.

FOCUSED Marketing Research, Inc.
Insight Research Associates
Insights Marketing Group, Inc.

ASIAN

Erlich Transcultural Consultants

ASSOCIATIONS

Market Navigation, Inc.
Pamela Rogers Research, LLC

AUTOMOTIVE

AutoPacific, Inc.
C&R Research Services, Inc.
Design Forum
Focus Latino
Erlich Transcultural Consultants

BIO-TECH

Market Navigation, Inc.
MedProbe, Inc.

BRAND/CORPORATE IDENTITY

Perception Research Services
Primary Insights, Inc.

BUILDING PRODUCTS

Marketing Advantage Rsch. Cnslts.

BUS.-TO-BUS.

C&R Research Services, Inc.
Cambridge Associates, Ltd.
Cambridge Research, Inc.

Fader & Associates
Fine Research & Marketing, Inc.
FOCUSED Marketing Research, Inc.
Just The Facts, Inc.
Knowledge Systems & Research, Inc.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Market Navigation, Inc.
MCC Qualitative Consulting
Millennium Research, Inc.
PRYBYL Group, Inc.
The Research Department
Pamela Rogers Research, LLC
Jay L. Roth & Associates, Inc.
Paul Schneller Qualitative LLC
Strategic Directions Group, Inc.
Synovate

CABLE

C&R Research Services, Inc.

CHILDREN

C&R Research Services, Inc.
Doyle Research Associates, Inc.
Fader & Associates
FOCUSED Marketing Research, Inc.
Insight Research Associates
Just The Facts, Inc.
Market Navigation, Inc.
Zebra Strategies

COMMUNICATIONS RESEARCH

Cambridge Associates, Ltd.
IMR-Innovative Media Research
Insight Research Associates

PRYBYL Group, Inc.
Jay L. Roth & Associates, Inc.

COMPUTERS/HARDWARE

In-Depth: Technology Market Rsch.
Leichliter Ascts. Mkt. Rsch/Idea Dev.

COMPUTERS/MIS

Daniel Associates
Fader & Associates
In-Depth: Technology Market Rsch.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Marketing Advantage Rsch. Cnslts.

CONSUMERS

C&R Research Services, Inc.
Consumer Focus LLC
The Consumer Network, Inc.
Decision Drivers
Fader & Associates
Fine Research & Marketing, Inc.
Insight Research Associates
Just The Facts, Inc.
Knowledge Systems & Research, Inc.
PRYBYL Group, Inc.
The Research Department
Jay L. Roth & Associates, Inc.
Strategic Directions Group, Inc.

CUSTOMER SATISFACTION

Marketing Advantage Rsch. Cnslts.
Synovate

DIRECT MARKETING

Consumer Focus LLC
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Synovate

DIVERSIFIED

View-Finders Market Research

EDUCATION

Insight Research Associates
Just The Facts, Inc.
Market Navigation, Inc.
PRYBYL Group, Inc.

ELECTRONICS

PRYBYL Group, Inc.

EMPLOYEES

Primary Insights, Inc.

ETHNIC/MULTICULTURAL RESEARCH

Cheskin

ETHNOGRAPHIC RESEARCH

C&R Research Services, Inc.
Cheskin
Consumer Dynamics and Behavioral Analysis, LLC
Doyle Research Associates, Inc.
Insights Marketing Group, Inc.
Primary Insights, Inc.
Synovate

EXECUTIVES

C&R Research Services, Inc.
Decision Drivers
Fader & Associates
Insight Research Associates
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Market Navigation, Inc.
The Research Department
Jay L. Roth & Associates, Inc.
Paul Schneller Qualitative LLC
Strategic Directions Group, Inc.
Synovate

FINANCIAL SERVICES

Jeff Anderson Consulting, Inc.
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Cambridge Research, Inc.
Consumer Focus LLC
Fader & Associates
FOCUSED Marketing Research, Inc.
Insight Research Associates
Insights Marketing Group, Inc.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Marketing Matrix International, Inc.
MCC Qualitative Consulting
Jay L. Roth & Associates, Inc.
The Research Department
Strategic Directions Group, Inc.
Synovate

FOOD PRODUCTS/ NUTRITION

C&R Research Services, Inc.
Cambridge Associates, Ltd.
Fine Research & Marketing, Inc.

Outsmart Marketing
Just The Facts, Inc.
The Research Department
Jay L. Roth & Associates, Inc.
Paul Schneller Qualitative LLC
Strategic Directions Group, Inc.
Synovate

HEALTH & BEAUTY PRODUCTS

C&R Research Services, Inc.
PRYBYL Group, Inc.
Paul Schneller Qualitative LLC
Synovate

HEALTH CARE

Jeff Anderson Consulting, Inc.
D/R/S Health Care Consultants
Erlich Transcultural Consultants
Fader & Associates
Focus Latino
Franklin Communications
Insight Research Associates
Knowledge Systems & Research, Inc.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
MedProbe™ Inc.
Synovate
Ten People Talking

HIGH-TECH

Jeff Anderson Consulting, Inc.
Cheskin
In-Depth: Technology Market Rsch.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
PRYBYL Group, Inc.
Jay L. Roth & Associates, Inc.
Synovate

HISPANIC

C&R Research Services, Inc.
Cheskin
Erlich Transcultural Consultants
Focus Latino
Herrera Communications
Hispanic Research Inc.
Insights Marketing Group, Inc.
Loretta Marketing Group
Utilis
Zebra Strategies

HOUSEHOLD PRODUCTS/CHORES

C&R Research Services, Inc.
The Research Department
Paul Schneller Qualitative LLC

HUMAN RESOURCES ORGANIZATIONAL DEV.

Primary Insights, Inc.

IDEA GENERATION

Doyle Research Associates, Inc.
Just The Facts, Inc.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Primary Insights, Inc.
Synovate

IMAGE STUDIES

Cambridge Associates, Ltd.
Leichliter Ascts. Mkt. Rsch/Idea Dev.

INSURANCE

Consumer Focus LLC
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Strategic Directions Group, Inc.
Ten People Talking

INTERACTIVE PROD./ SERVICES/RETAILING

Leichliter Ascts. Mkt. Rsch/Idea Dev.

INTERNATIONAL

Fader & Associates
Insight Research Associates
Primary Insights, Inc.
Pamela Rogers Research, LLC

INTERNET

C&R Research Services, Inc.
Fader & Associates
In-Depth: Technology Market Rsch.
Knowledge Systems & Research, Inc.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
MCC Qualitative Consulting
Jay L. Roth & Associates, Inc.
Synovate

INTERNET SITE CONTENT/DESIGN

FOCUSED Marketing Research, Inc.

INVESTMENTS

Leichliter Ascts. Mkt. Rsch/Idea Dev.
Strategic Directions Group, Inc.

LATIN AMERICA

C&R Research Services, Inc.
Insights Marketing Group, Inc.
Loretta Marketing Group

MEDICAL PROFESSION

Cambridge Associates, Ltd.
D/R/S Health Care Consultants
In-Depth: Technology Market Rsch.
Insight Research Associates
Market Navigation, Inc.
MedProbe™ Inc.
Paul Schneller Qualitative LLC
Strategic Directions Group, Inc.
Ten People Talking

MODERATOR TRAINING

Market Navigation, Inc.

NEW PRODUCT DEV.

C&R Research Services, Inc.
Cambridge Associates, Ltd.
Cheskin
Consumer Dynamics and Behavioral Analysis, LLC
Doyle Research Associates, Inc.
Fader & Associates
Insight Research Associates
Just The Facts, Inc.
Market Navigation, Inc.
Millennium Research, Inc.
The New Marketing Network, Inc.
Outsmart Marketing
PRYBYL Group, Inc.
The Research Department
Pamela Rogers Research, LLC

Jay L. Roth & Associates, Inc.
Paul Schneller Qualitative LLC
Synovate

OBSERVATIONAL RSCH.

Consumer Dynamics and Behavioral Analysis, LLC
Doyle Research Associates, Inc.
Primary Insights, Inc.

ONLINE FOCUS GROUPS

C&R Research Services, Inc.
Cambridge Associates, Ltd.
Doyle Research Associates, Inc.
Insights Marketing Group, Inc.
Leichliter Ascts. Mkt. Rsch/Idea Dev.

PACKAGE DESIGN RESEARCH

C&R Research Services, Inc.
Consumer Dynamics and Behavioral Analysis, LLC
The Consumer Network, Inc.
Insight Research Associates
Leichliter Ascts. Mkt. Rsch/Idea Dev.
The Research Department

PACKAGED GOODS

C&R Research Services, Inc.
Cheskin
Consumer Dynamics and Behavioral Analysis, LLC
Doyle Research Associates, Inc.
Focus Latino
FOCUSED Marketing Research, Inc.
Insight Research Associates
Insights Marketing Group, Inc.
Just The Facts, Inc.
Jay L. Roth & Associates, Inc.
Synovate

PARENTS

Fader & Associates
Market Navigation, Inc.

PET PRODUCTS

C&R Research Services, Inc.
Cambridge Research, Inc.
FOCUSED Marketing Research, Inc.
IMR-Innovative Media Research
Primary Insights, Inc.
PRYBYL Group, Inc.

PHARMACEUTICALS

C&R Research Services, Inc.
Cambridge Associates, Ltd.
D/R/S Health Care Consultants
Fader & Associates
Focus Latino
FOCUSED Marketing Research, Inc.
Franklin Communications
IMR-Innovative Media Research
In-Depth: Technology Market Rsch.
Insight Research Associates
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Market Navigation, Inc.
MCC Qualitative Consulting
MedProbe™ Inc.
Pamela Rogers Research, LLC
Paul Schneller Qualitative LLC
Strategic Directions Group, Inc.
Synovate
Ten People Talking

POLITICAL/SOCIAL RESEARCH

Cambridge Associates, Ltd.
Market Navigation, Inc.
View-Finders Market Research

POSITIONING RESEARCH

Outsmart Marketing
Paul Schneller Qualitative LLC

PUBLIC POLICY RSCH.

Cambridge Associates, Ltd.

PUBLISHING

Cambridge Associates, Ltd.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Market Navigation, Inc.

QUALITATIVE END-USER TRAINING

Primary Insights, Inc.

RETAIL

Knowledge Systems & Research, Inc.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
MCC Qualitative Consulting
Synovate

SENIORS

C&R Research Services, Inc.
The Consumer Network, Inc.
Insight Research Associates

Primary Insights, Inc.
Strategic Directions Group, Inc.

SMALL BUSINESS/ENTREPRENEURS

FOCUSSED Marketing Research, Inc.
Strategic Directions Group, Inc.

SOFT DRINKS, BEER, WINE

C&R Research Services, Inc.
Cambridge Associates, Ltd.
Focus Latino
FOCUSSED Marketing Research, Inc.
Jay L. Roth & Associates, Inc.

SPORTS

FOCUSSED Marketing Research, Inc.
Pamela Rogers Research, LLC

STRATEGY DEVELOPMENT

Primary Insights, Inc.
Paul Schneller Qualitative LLC
Strategic Directions Group, Inc.

TEACHERS

Market Navigation, Inc.
PRYBYL Group, Inc.

TEENAGERS

C&R Research Services, Inc.
Doyle Research Associates, Inc.
Fader & Associates

Focus Latino
Insight Research Associates

TELECOMMUNICATIONS

Daniel Associates
In-Depth: Technology Market Rsch.
Insight Research Associates
Knowledge Systems & Research, Inc.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
MCC Qualitative Consulting
The Research Department
Jay L. Roth & Associates, Inc.
Synovate

TELECONFERENCING

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

TELEPHONE FOCUS GROUPS

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

TOURISM/HOSPITALITY

Fine Research & Marketing, Inc.

TOYS/GAMES

C&R Research Services, Inc.
Fader & Associates
PRYBYL Group, Inc.

TRAVEL

Cambridge Associates, Ltd.
Fine Research & Marketing, Inc.
FOCUSSED Marketing Research, Inc.
PRYBYL Group, Inc.
Strategic Directions Group, Inc.

UTILITIES

Cambridge Associates, Ltd.
Knowledge Systems & Research, Inc.
Jay L. Roth & Associates, Inc.
Strategic Directions Group, Inc.

VETERINARY MEDICINE

FOCUSSED Marketing Research, Inc.
IMR-Innovative Media Research
Paul Schneller Qualitative LLC

WEALTHY

Leichliter Ascts. Mkt. Rsch/Idea Dev.
Strategic Directions Group, Inc.

YOUTH

C&R Research Services, Inc.
Zebra Strategies



**find a
job
or
fill a
position
free**



www.quirks.com

index of advertisers

ActiveGroup21 Ph. 800-793-3126 www.activegroup.net	Erlich Transcultural Consultants15 Ph. 818-623-2425 www.etcethnic.com	Microtab, Inc.36 Ph. 866-642-7682 www.microtab.com
ADAPT, Inc.50 Ph. 888-522-3278 www.adeptdata.com	Fieldwork, Inc.3 Ph. 800-T0-FIELD www.fieldwork.com	Midwest Video, Inc.44 Ph. 248-583-3630 www.midwestvideo.com
Advanced Focus96 Ph. 212-217-2000 www.advancedfocus.com	Focus Groups Of Cleveland Survey Center ...100 Ph. 800-950-9010 www.focusgroupsofcleveland.com	MORPACE International, Inc.31 Ph. 800-878-7223 www.morpace.com
Advantage Research, Inc.76 Ph. 877-477-7001 www.ariadvantage.com	FocusVision VideoStreaming, Inc.83 Ph. 800-433-8128 www.focusvision.com	MRSI (Marketing Research Services, Inc.) ..54 Ph. 800-SAY-MRSI www.mrsi.com
Affordable Samples, Inc.22 Ph. 800-784-8016 sales@affordablesamples.com	FocusVision Worldwide, Inc.6-7, 77 Ph. 800-433-8128 www.focusvision.com	The Olson Research Group, Inc.81 Ph. 609-882-9888 www.olsononlinesystems.com
The Analytical Group, Inc.69 Ph. 800-946-2767 www.analyticalgroup.com	Franklin Communications86 Ph. 973-601-0111 www.fc4research.com	On-Line Communications, Inc.58 Ph. 800-765-3200 www.on-linecom.com
Anderson, Niebuhr & Associates, Inc.74 Ph. 800-678-5577 www.ana-inc.com	GMI (Global Market Insite, Inc)63 Ph. 206-315-9300 www.gmi-mr.com	Opinion Access Corp.97 Ph. 718-729-2622 www.opinionaccess.com
Apian Software71 Ph. 800-237-4565 www.apian.com	Greenfield Online25 Ph. 866-899-1013 www.greenfield.com	Opinion Search, Inc.Back Cover Ph. 800-363-4229 www.opinionsearch.com
Askia, Inc.23 Ph. 212-677-6781 www.askia.com	GroupNet73 Ph. 800-288-8226 www.group-net.com	The Opinion Suites89 Ph. 804-484-4800 www.OpinionSuites.com
Baltimore Research Inside Front Cover, 13 Ph. 410-583-9991 www.baltimoreresearch.com	i.think inc.17 Ph. 214-855-3777 www.ithinkinc.com	P. Robert and Partners S.A.5 Ph. [41] 21-802-8484 www.probert.com
Bloomer Access Panels Europe . Inside Back Cover Ph. [31] (10) 4000909 www.bloomer.com	I/H/R Research Group82 Ph. 800-254-0076 www.ihr-research.com	Pulse Train Technology, Ltd.18 Ph. 561-842-4000 www.PTTSystems.com
Burke Institute95 Ph. 800-543-8635 www.BurkeInstitute.com	ICR/International Communications Research 41 Ph. 484-840-4300 www.icrsurvey.com	QRCA, Inc.75 Ph. 731-584-8080 www.qrca.org
Burke, Incorporated40 Ph. 800-688-2674 www.burke.com	Inquisite Web Surveys11 Ph. 800-581-7354 www.inquisite.com	QSR International64 Ph. 877-595-5230 www.qsrinternational.com
Common Knowledge Research Services .48-49 Ph. 800-710-9147 www.commonknowledge.com	InsightExpress, LLC65 Ph. 877-329-1552 www.insightexpress.com	Readex Research Mail Research Center28 Ph. 800-873-2339 www.b2bmrc.com
Computers for Marketing Corp. (CfMC) ...98 Ph. 415-777-0470 www.cfmc.com	InterClipper34 Ph. 973-733-3434 www.vicCD.com	Research Resolutions, Inc.88 Ph. 214-239-3939 www.ResearchResolutions.com
Consumer Opinion Services, Inc.70 Ph. 503-493-2870 www.cosvc.com	Issues and Answers Network, Inc.30 Ph. 757-456-1100 www.issans.com	Sawtooth Software, Inc.60 Ph. 360-681-2300 www.sawtoothsoftware.com
Consumer Surveys Co.93 Ph. 847-394-9411 consumersurveys1@aol.com	Itracks.com26-27 Ph. 888-525-5026 www.itracks.com	Sawtooth Technologies, Inc.55 Ph. 847-239-7300 www.sawtooth.com
Corporate Research International56-57 Ph. 419-422-3196 www.mysteryshops.com	JRA, J. Reckner Associates, Inc.19 Ph. 215-822-6220 www.reckner.com	Schlesinger Associates, Inc.9 Ph. 866-549-3500 www.schlesingerassociates.com
Data Recognition Corporation79 Ph. 800-826-2368 www.datarecognitioncorp.com	Key Survey99 Ph. 817-491-2450 www.keysurvey.com	Scientific Telephone Samples91 Ph. 800-944-4STS www.stssamples.com
Database Sciences, Inc.87 Ph. 800-742-6035 www.dbsciences.com	Luth Research45 Ph. 800-465-5884 www.luthresearch.com	Socratic Technologies, Inc.60 Ph. 800-5-SOCRATIC www.sotech.com
Davis Research, LLC61 Ph. 800-366-2408 www.davisresearch.com	M/A/R/C® Research43 Ph. 800-884-MARC www.marcresearch.com	Survey Sampling International59 Ph. 203-255-4200 www.surveysampling.com
Decipher, Inc.47 Ph. 800-923-5523 www.decipherinc.com	Maritz Research33 Ph. 887-4MARITZ www.maritzresearch.com	Survey Service, Inc.53 Ph. 800-507-7969 www.surveyservice.com
Decision Analyst, Inc.67 Ph. 817-640-6166 www.decisionanalyst.com	Market Probe, Inc42 Ph. 414-778-6000 www.marketprobe.com	Western Wats Interviewing Center29 Ph. 801-373-7735 www.westernwats.com
Digital Marketing Services, Inc. (DMS)35 Ph. 800-409-6262 www.DMSdallas.com	Marketing Systems Group85 Ph. 800-336-7674 www.m-s-g.com	
e-Rewards Inc.37 Ph. 888-203-6245 www.e-rewards.com	McMillion Research Service51 Ph. 800-969-9235 www.mcmillionresearch.com	

classified ads

Connecticut's Two Top Facilities



THE QUESTION SHOP, inc.

A Marketing Research Firm

Focus Groups and All Types of Surveys

RYAN REASOR
President

2860 N. Santiago Blvd.
Suite 100
Orange, CA 92667
(714) 974-8020
FAX: (714) 974-6968

READY TO GROW? NEED A CHANGE? UP FOR A NEW CHALLENGE?

MRCGROUP is growing. We are looking for a high energy, highly motivated sales individual to assist in the revenue generation of our company. Individual will be responsible for the sales of our quantitative phone business in our state of the art call center. Candidates must have a proven track record. Market research experience in an outbound call center (CATI preferred) with a proven customer base. We offer a competitive salary with bonuses and benefits.

Qualified candidates should forward resumes with salary requirements to:
Esherman@mrcgroup.com

EOE

Reprints • Eprints • Reprints • Eprints • Reprints • Eprints • Reprints • Eprints

Were You Featured In This Issue?

Reprints are a polished way to showcase third party endorsements adding credibility to your product, company or service. They demonstrate to your clients, partners and employees that you have been recognized in a well-respected magazine.



We can professionally customize your reprints with your company logo and business information.

Call Today!

R Rhonda Brown
rbrown@fostereprints.com
(866) 879-9144 x194
www.fostereprints.com

Searching for a research company?



Use our online directories at www.quirks.com for instant access to information on thousands of research firms.



enues generated by research, and I frankly think that's the wrong way to look at it. A successful research project will likely not contribute directly to a company's bottom line. But if the insights from that project lead to the launch of a successful new product, for example, then research's contributions deserve to be recognized. That's where the proof of ROI can be found.

This notion also came up during the presentation from the Marketing Science Institute's Paul Root and Judy Melanson of Chadwick Martin Bailey. They talked about the results of focus groups with research directors and CEOs of client companies on the topic of measuring the value of research.

The consensus was that research needs to demonstrate a return but not necessarily a return on investment. That can take the form, the focus group respondents said, of making money on a new product or of saving money by "helping to kill bad ideas." And the executives agreed that research ROI is difficult to measure anyway since, once the research is done, so many other decisions are made and departments are involved as a project progresses.

New life for old methods

During the state of the industry panel, Azar also had some interesting comments on Allstate's use of phone research. In response to moderator Jon Last's question on whether telephone research is dying, Azar said Allstate is looking carefully at how consumers have said they want to interact with the company. Filing an insurance claim, for example, is a private matter which customers prefer doing over the phone as opposed to online. So Allstate would likely conduct a survey on the claims process over the phone rather than online. The insurer still gets good results from its phone research, Azar said, and has actually seen a bit of a decline in responses to its Web-based studies.

Like phone research, mall research is another seemingly ailing facet of the industry. But owners of mall facilities and their clients aren't ready to give up just yet. During an afternoon discussion, panelists offered tips to help facilities stay competitive. For example, rather than spending time responding to charges that mall research doesn't stack up against online research, facility owners should focus on mall research's strengths: it's an inexpensive way to conduct face-to-face research among a broad cross-section of people (especially kids), and there are many clients who still prefer face-to-face for their studies; malls are great for product use tests, especially involving items requiring refrigeration; and as more facilities add high-speed Internet access, they become ideally equipped for concept testing. There may even be a new customer base for mall research: panelist Tammie Frost-Norton of Gantz Wiley Research said she has seen an occasional preference for mall research from international firms doing research in the U.S. because it more closely

mirrors the door-to-door and other in-person methods used more readily overseas.

Beware the next wave?

James McQuivey of Forrester Research closed out the conference with a fascinating if chilling talk on the role of technology in the future of research. He cited Arbitron's Portable People Meter as a prime example of what he called "next wave" technologies: basically passive methods of tracking the products we buy, media we consume, etc. Others include global positioning system (GPS) and radio frequency identification (RFID).

He sketched a vision of a not-too-distant future in which these types of technologies could be married to allow a kind of always-on monitoring of our consumption habits. He wasn't advocating such a system; rather, his goal was to make the audience aware of what's out there and what might be coming next so we can start forming answers to crucial questions. Such as, how much information do companies really need about their customers? Where is the line between monitoring and controlling?

McQuivey played a memorable clip from the film *Minority Report* in which Tom Cruise's character, his identity established by ocular scanners, is bombarded by personalized holographic ads as he enters various stores. We're not quite at that point, but with all of us happily toting cell phones and other microchip-bearing electronic devices, we're not that far from it.

McQuivey didn't have copies of his presentation to hand out to attendees but he made a point of telling us it was available online at www.forrester.com/mra. Appropriately enough, however, if you want to view it, you'll have to complete a detailed registration form. | Q

corrections

In a Survey Monitor entry on furniture buying on page 77 of the May issue, the range of birth years encompassing the Baby Boom generation was incorrectly listed as 1946-1955. It should have been 1946-1964.

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

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

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

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

Reprints: For information on article reprints contact Rhonda Brown at [FosteReprints at 866-879-9144 ext. 194](mailto:FosteReprints@866-879-9144) or at rbrown@fostereprints.com.



Reading the tea leaves in Boston

The folks at the Marketing Research Association assembled a dandy program last month in Boston for the organization's annual conference. Attendance was up (way up!), most of the sessions I attended were SRO, and the general mood was one of optimism. Even a potentially gloomy program on the future of mall research provided some rays of sunshine.

In her fast-paced general session opener, Regina Lewis, director of brand and consumer insight at Allied Domecq, spoke on the critical role that marketing research played in helping Allied Domecq's Dunkin' Donuts unit roll out its line of lattes and cappuccinos.

To do battle against the Starbucks of the world, Dunkin' Donuts sought to create and market a line of fancy coffee drinks at not-so-fancy prices. The firm's success with customer involvement in the product development process has led to an interest in engaging customers to create new and improved feedback loops, Lewis said, with the goal of making customers "your advocates, your ear to the ground."

Bernard Brenner, director of North America research and insights at Nokia, delivered a candid and similarly substantive look at how a well-known company is learning to change from being technology-focused to being consumer-focused. With cell

phones now viewed as a commodity, Nokia has seen its share price slip. To drive future growth in such an environment and earn customer loyalty, the company is trying to become more benefit-driven rather than feature-driven.

On the research front, Brenner said the firm is moving more and more to the qualitative side of things. Whereas in 2000, 70 projects were conducted using quantitative methods, in 2004 70 qualitative projects are on tap. Even the nature of that qualitative is changing, from a reliance on focus groups to a preference for in-depth interviews. And with consumers seemingly growing accustomed to being interviewed, Brenner said Nokia is choosing observational and ethnographic studies to be able to watch what people do rather than what they say they do.

Brenner offered comments on what clients like Nokia want from their research providers (or should I say "partners"?):

- They don't want generalists. Suppliers must have some core competencies and must strive to understand the client's business.
- "Research drives technology, technology does not drive research." In other words, make sure your flashy research product or methodology has some guts beneath its fancy sheen.
- Size means nothing. Some of Nokia's best relationships are with

smaller research firms.

- Nokia hires people, not companies. Brenner said they have followed a favorite moderator to three different firms.

These and other sentiments were echoed in a later session led by Harris Interactive's Merrill Dubrow (who may want to ditch the research biz and tackle stand-up comedy) on client needs. Participants agreed that research providers need to include a solution along with any problems they identify through the research. It's not enough to tell the client something is wrong; you have to tell them how to fix it.

RIP ROI?

During the obligatory "state of the industry" session (which rose above the norm thanks to a well-spoken line-up of panelists including Bob Lederer of RFL Communications and Simon Chadwick of Cambiar Consulting) Allstate's Pablo Azar delivered a sentiment on return-on-investment (ROI) that I hope becomes more widely held: ROI doesn't need to come from the marketing research itself but from the programs that marketing research supports. Too many folks, whether they be researchers or those who OK the purchase of research, are focused on finding ways to demonstrate the rev-

continued on page 109



bloomerice

access panels europe

europa is closer than you think

We believe that online access panels are the future for consumer data collection around the world, and that quality data can only come from quality panels.

We believe that panel quality is rooted in an understanding of the fundamentals of research, grows through local knowledge and blooms with dedication and experience.

We believe, do you?

→ europe's
no.1
online
access
panel

Why Bloomerice ?

- one-stop-shop for pan-European access
- research only, community-based panels
- multi-sourced recruitment
- continuous panel growth and replenishment
- sophisticated sampling methods
- smart loyalty programs
- experienced, independent and dedicated

Dedicated to facilitating the research industry with the highest quality in online access.
Contact us at info@bloomerice.com

europa	community	size	world/other	size
Austria	www.meinungswelt.at	3,059	Africa	3,389
Belgium	www.opinieland.be	20,358	Australia	4,964
Denmark	www.opinionsland.com	31,518	Canada	9,505
Finland	www.mielipidemaailma.com	45,663	China	89,448
France	www.placedesopinions.com	60,155	Croatia	2,162
Germany	www.meinungswelt.com	46,823	Hong Kong	1,256
Italy	www.mondodiopinione.it	45,553	Hungary	2,692
Netherlands	www.opinieland.nl	111,982	Mexico	2,776
Norway	www.meningstorget.com	19,136	Russia	11,365
Poland	www.swiatopinii.com	17,001	Ukraine	1,605
Spain	www.opiniolandia.com	21,269	USA	24,968
Sweden	www.asiktorget.com	36,980	World misc.	28,132
Switzerland	www.meinungswelt.com	10,170		
UK	www.opinionworld.co.uk	71,231	Total	723,160

europa's leading online
access panel provider

www.bloomerice.com

What has your field house done for you lately?

Opinion Search Inc. offers high quality data collection with real-time online access to your survey data 24/7.

With 260 CATI stations across 3 Canadian call centers, professional college educated interviewers and onsite quality control, we offer superior data collection services. The Opinion Search difference: results-oriented solutions for our clients.

- **Telephone interviewing (CATI)**
 - Consumer & business
 - Elite interviewing (CEO/CFO/MIS)
 - Multilingual capabilities
- **Real-time online secure access to telephone survey data (via our dataCAP)**
 - View frequencies, dispositions & verbatim responses
 - Run cross-tabulations
- **Online questionnaire programming and hosting for e-mail and web-intercept surveys**
- **Full tabulation services**

To find out more call us at 1-800-363-4229
or visit us at www.opinionsearch.com.



OpinionSearch

TARGETING OPINION WORLDWIDE