



QUIRK'S

Marketing Research Review

JANUARY 2005

Mystery shopping issue

- > Shopping program delivers for USPS
- > New technologies give mystery shopping a boost

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- > A study of non-response patterns
- > Testing multi-page print ads online

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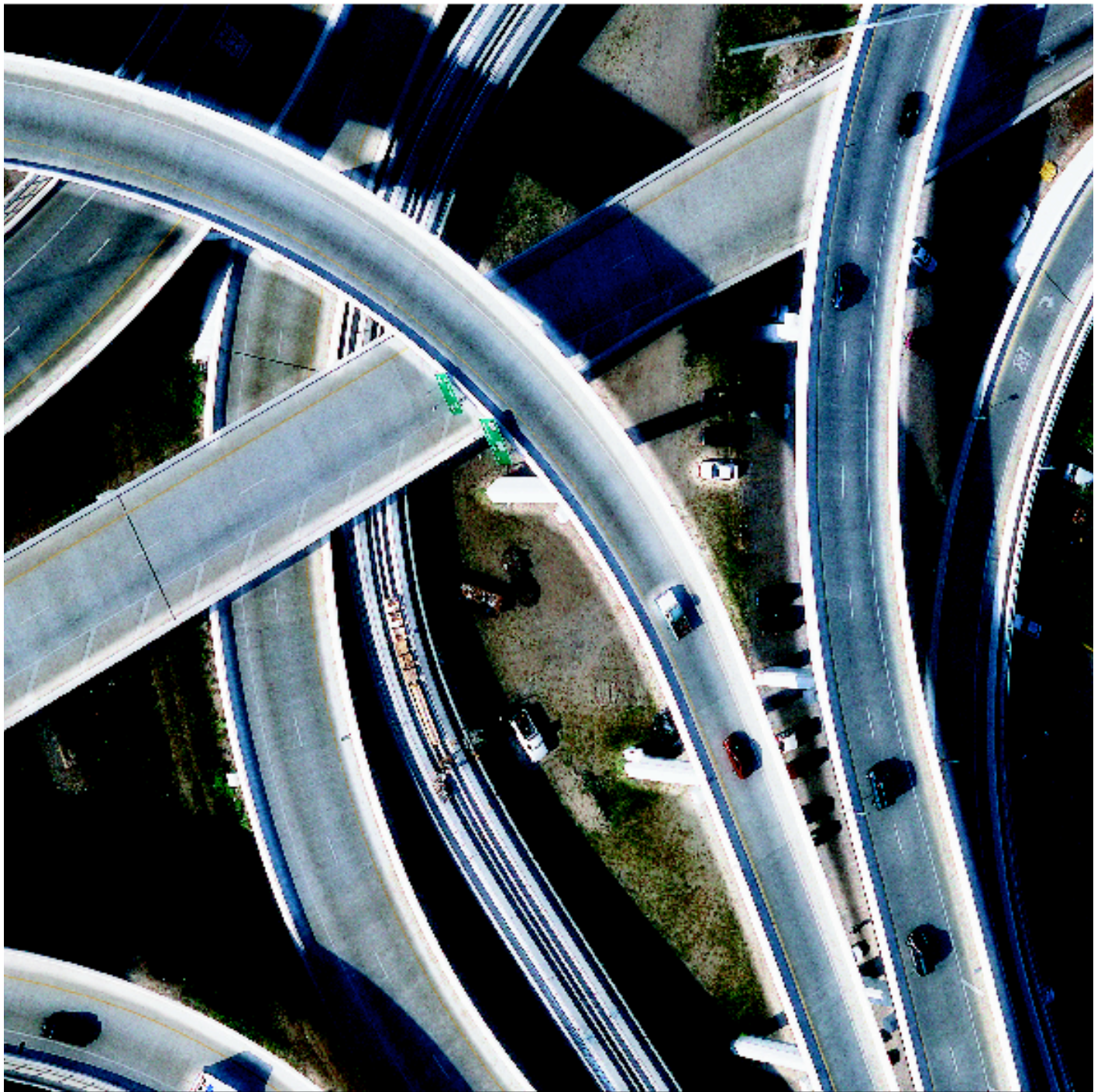
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Online market research booming, according to survey

European online research firm Ciao interviewed 260 market researchers in Europe and North America who are users of online research to compile the Ciao Online Research Barometer. It showed that the vast majority of online research users (87 percent) expected that their company's use of online would increase in the next six months. Over a third (36 percent) said they expected it to greatly increase.

The survey also asked researchers their reasons for choosing online over other methodologies. Seventy-three percent cited time advantages, and 71 percent competitive pricing. Nearly two-thirds mentioned the

A&U studies (71 percent) and concept tests (68 percent). In terms of business sectors, online is used across a wide breadth: 80 percent of respondents had used online for consumer goods research and 40 percent for business-to-business research. For more information visit www.ciao-ag.com.

Study analyzes home improvement queries

Tom Kraeutler and Debby Robinson, hosts of *The Money Pit*, a nationally syndicated home improvement radio show, recently teamed up with Fred Miller, president of Consumer Specialists and managing director of the Home Improvement Research Institute (HIRI), to determine the most common problems and projects home improvement-minded consumers sought to tackle in their pleas to the program.

Among the findings of their analysis of almost 2,000 listener calls and e-mails to the program over the last two years:

- Men were one-and-a-half times more likely than women to ask how to do a project, perhaps proving that men will ask for directions. Women, on the other hand, were four times more likely than men to call and ask how to fix a project gone wrong.

- The top 10 projects consumers have questions about were: floor coverings; plumbing; windows/siding; kitchen/bath; walls/ceilings; heating/air conditioning; roofing; bugs, pests and rodents; indoor air quality/mold; and basements/crawlspaces.

- Women were twice as likely as men to use e-mail to ask a home improvement question.

- Women were over twice as like-

ly to ask a safety question than we men.

Kraeutler says that callers to the program are looking for easy-to-understand answers for home repair projects and 14 percent of those reaching out to the show did so purely to get a product recommendation from the expert team. "They are often confused by advertising claims and turn to us for independent guidance on the right products, economical ways to complete their projects, new ideas - and even to prevent them from getting in over their heads," he says.

Surprisingly, more men (63 percent) than women (37 percent) contact the show to ask questions and they do so in disproportionate numbers to the actual audience make-up. "We know that 46 percent of our audience is women yet they only account for 37 percent of those who contact the show. It may be that while women are playing an increasingly major role in home improvement, they still may be somewhat more reluctant than men to reach out for help," says Kraeutler.

Key home improvement topics for women are plumbing; kitchens/bath; roofing; bugs, pests/rodents; indoor air quality/mold; basements and crawlspaces; and painting and wallpapering. Men prefer to talk about floor coverings; windows/siding; foundations; insulation/ventilation; and decks.

"In our industry more than half of all home improvement dollars are spent by women," says Robinson. "While it might not surprise you to learn that women show more interest than men do in kitchen/bath or painting/wallpapering topics, even we were sur-

continued on page 82



use of multimedia elements (59 percent) and access to complex target groups was a reason cited by over half (53 percent).

The survey also illustrated the scope of today's online research arena. Over two-thirds of online research users had used online for satisfaction studies (73 percent),

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names of note

Betsy Frank has been named to the newly created position of executive vice president, research and planning, at *Viacom's Cable Networks, Film and Publishing*.

Tricycle, Inc., a Chattanooga, Tenn., provider of technology products and services to the carpet manufacturing industry, has named **Caleb Ludwick** market intelligence manager.

Peter Picard has joined *Teenage Research Unlimited*, Northbrook, Ill., as research director.



Picard

Harmon

Brad Harmon has been named vice president, consulting services, at *Walker Information*, Indianapolis. The firm has named three new project directors to its client services department: **Jessica Kirsch**, **Joel Schaafsma**, and **Christina Will**. Walker also has promoted the following associates in the client services and technology departments: **Jennifer Geise** to director, IT project manager; **Rebecca Tearman** to programmer/analyst 2; and **Brian O'Rourke** and **Mike Schwarz** to programmer/analyst.

Michael Frantz has been named executive vice president - marketing services, of *NOVO 1, Inc.*, a Waukesha, Wis., direct marketing firm. Marketing research will be among his new responsibilities.

Steve Carroll has joined *J.D. Power and Associates*, Westlake



Carroll

Village, Calif., as a senior partner and executive vice president of client services.

Maura Lewis has joined New York search engine marketing agency *icrossing* as director of analytics.

New York-based *IMAP Research*, a division of The Ziment Group, has named **Mike Kelly** president.

Jennifer Karsh has joined *C&R Research*, Chicago, as a qualitative research director with InVision, the company's qualitative division. In addition, **Joy Boggio** has been named senior manager of coding.

John Carter has joined the consumer products division of New York-based *Ipsos* as vice president.

Jeff Carroll has joined *FocusVision Worldwide*, Stamford, Conn., as vice president of VideoMarker services. In addition, **Jennifer VanGele** has been named senior account director for the Southeast territory.

John Kerr has been named account associate at *Directions Research Inc.*, Cincinnati. The following have joined Directions as associates: **Debra Miller**, senior data analyst; **Steve Decker**, project manager; **Jeffrey Krohl**, on-site

account manager; **Amanda Chalk** and **Michael Hunter**, research assistants.

London-based research firm *Synovate Healthcare* has named **Simon Woodlock** chief financial officer. Separately, Synovate has named **Christian Batte** as general manager of its Maghreb (Morocco, Algeria and Tunisia) operations. And **Andreas Zachariou** has been named general manager of Synovate's UAE office.

Millward Brown has announced a number of appointments. **Joanna Seddon** has been named executive vice president. At Millward Brown France, **Anne Monnier** has been named head of client service; **Robin Pellaton** has been named client service director; and **Kalya Ousmane** has been named associate client service director. At Millward Brown UK, **Sara Law** has been appointed associate account director.

Derek Allen has been named senior vice president, marketing sciences at *Research International*, Chicago.

Netherlands-based *VNU* has named **Rob Ruijter** chief financial officer, effective January 1, 2005.

Maria Santonato has joined *Product Evaluations, Inc.*, La Grange, Ill., as an account executive.

Following Kjell de Orr's appointment as group managing director of GfK Martin Hamblin, **Andrew Reid** has taken over his role as the global head of strategic accounts and client development (SACD) in Germany-based GfK's Custom Research division.

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product and service update

IRI links with TiVo to measure impact of DVRs

Chicago-based Information Resources, Inc. (IRI) is now offering a measurement service designed to measure ad effectiveness among households using digital video recorders (DVRs). The new IRI BehaviorScan DVR Service will enable national advertisers to quantify the impact of DVR technology adoption on ad effectiveness and, ultimately, brand and category sales. The service was developed in close cooperation with TiVo, Inc. and is supported by a consortium of national advertisers in the CPG industry. Through the agreement, IRI will provide TiVo DVRs to its BehaviorScan household panelists who choose to participate in the program and obtain viewership data licensed from TiVo to deliver insight into the rapidly evolving media world.

The service uses the BehaviorScan in-market testing service to analyze the purchasing behavior of households who subscribe to the TiVo service compared to households without the TiVo service, in the same market. IRI will place the TiVo units in a portion of their existing panelists' homes who have agreed to allow TiVo to track their exact viewing behavior in order to form the basis for comparison. For more information visit www.infores.com.

Database covers U.S. hospitals, doctors

The new 2005 United States Healthcare Database includes information on more than 7,000 hospitals, 25,000 nursing homes and 400,000 doctors. Each record is indexed by such features as name, address, phone and fax. The database is available in Excel format on CD-ROM. The data can be selected by state or other criteria such as type of practice. It can be used on an unlimited basis.

This database covers over 250,000

key personnel and facility contacts. Information includes senior managers at each facility (including purchasing, IT, nursing, etc.) along with mailing address, direct-dial phone numbers and fax numbers. It also includes updated information on hospital ownership, beds, employees, admissions, discharges and specialized services. For more information call 416-765-0028.

Service provides ratings for online radio

New York-based firms Arbitron Inc. and comScore Media Metrix have introduced a new service designed to provide traditional broadcast ratings for the online radio industry. America Online's AOL Radio Network, Yahoo!'s LAUNCHcast, and Microsoft's MSN Radio and Windowsmedia.com have signed on as charter subscribers for the new service. The service, which is named comScore Arbitron Online Radio Ratings, is the result of collaboration between Arbitron and comScore Media Metrix. The data will be released monthly.

The comScore Arbitron Online Radio Ratings service is based on a subset of approximately 200,000 U.S. participants within the comScore global consumer panel. Using proprietary technology, comScore captures the online behavior of these panelists, including online radio listening behavior. The service will provide customers with average quarter-hour and cume audience estimates for traditional broadcast dayparts and demographics. This allows online radio to be planned and bought using the same metrics as those used by traditional radio. For more information visit www.arbitron.com.

Perseus updates SurveySolutions/EFM

Perseus Development Corporation, a Braintree, Mass., research software

firm, has released Perseus SurveySolutions/EFM (Enterprise Feedback Management) 1.1, the latest version of its Web-based survey application. SurveySolutions/EFM allows enterprise managers to centrally manage and control the survey practices of their organization by applying content approvals and controls throughout the entire survey process in a secure, shared environment. In addition, users can produce surveys, collaborate on survey projects, and get the results they need without having to rely on IT resources. New features include: a step-by-step questionnaire designer, improved usability, increased deployment flexibility, expanded report types, and enhanced invitation designer. For more information visit www.perseus.com.

New tool lets users bookmark focus group videos

FocusVision Worldwide, Inc., Stamford, Conn., has launched VideoMarker CD Recording. During focus group sessions, back room observers can make video bookmarks of key moments or quotes, and then receive a CD from the facility when the sessions end. The CD includes the session video and all the marks made by all observers. It also includes the VideoMarker Editor software which allows users to review the video, make additional marks, and create video clips for placement in e-mails or PowerPoint slides. VideoMarker CD Recording will be available in the following facility networks in the first quarter of 2005: Schlesinger Associates, Focus Pointe, Delve, Fieldwork Inc., and GroupNet. For more information visit www.focusvision.com.

Doane studies Asian soybean rust

Doane Marketing Research, St. Louis,

continued on page 86



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research industry news

News notes

Crain Communications Inc., parent of *Advertising Age*, has purchased *American Demographics* magazine from Primedia Inc. and shut it down. Crain plans to incorporate coverage of demographic trends into *Ad Age* and *AdAge.com*.

San Francisco-based **CfMC** has adopted a new logo, color scheme and signature line: "Research Software." CfMC has been known as Computers for Marketing Corporation over the years, although researchers and clients increasingly have referred to the firm as simply CfMC. With this redesign, the company now is known exclusively by those four letters.

New York-based **Nielsen Media Research** and **Univision Communications, Inc.** announced that Univision has dismissed litigation that sought to halt

Nielsen's use of Local People Meter (LPM) service in Los Angeles, and Nielsen has withdrawn its motion against Univision under California's Strategic Litigation Against Public Participation (SLAPP) statute.

LPMs, which measure TV ratings electronically, have been used in Los Angeles since July 8, 2004. The Media Rating Council, which independently audits ratings systems, has conditionally accredited Nielsen's LPM systems in New York, Los Angeles and Chicago and fully accredited Nielsen's LPM system in Boston. In 2005, Nielsen will introduce Local People Meters into Philadelphia, Washington, D.C., Dallas and Detroit; and will launch the service in Atlanta in 2006.

Arbitron Inc., New York, has selected Octave Technology Inc., College Park, Md., a software and technology company, to explore the possible integration of passive auto identification (ID) technology -

such as radio frequency identification (RFID) functionality - into Arbitron's Portable People Meter (PPM) system. The two companies expect to gain a greater understanding of the capabilities of passive RFID readers and chipsets for media and market research applications as well as develop insights into the likelihood, costs and challenges in integrating these technologies.

Waukesha, Wis.-based **Call Solutions** has changed its name to **NOVO 1, Inc.**

Acquisitions

New York research firm **Schulman, Ronca, & Bucuvalas, Inc.** has acquired Cincinnati-based **Catalina Marketing Research Solutions** (CMRS), formerly Alliance Research. CMRS/Alliance will be integrated into SRBI's Marketing Insights Division, also headquartered in the Cincinnati area. Specific terms of the agreement were not disclosed.

The Fairfield, Conn.-based **Kantar Group** has acquired **Cannondale Associates** with offices in Wilton, Conn., and Evanston, Ill., the company provides strategic consulting services in areas such as category management, trade promotion, channel development and frequent-shopper data analysis, as well as offering proprietary software solutions and industry benchmark research to augment these consulting services. All senior Cannondale management, including Jack Ryder, John Carlson, Paul Crnkovich, Ken Harris, Bob Hilarides, Sven Risom and Don Stuart, will remain in their current positions with company.

The **NPD Group**, Port

Calendar of Events January-March

Strategic Research Institute will hold its annual conference on marketing to U.S. Hispanics and Latin America on January 24-27 at the Wyndham Miami Beach Resort, Miami Beach, Fla. For more information visit www.srinstitute.com.

ESOMAR will hold "Age Matters: Interpreting Needs, Developing Strategies" on January 30-February 1 in London. For more information visit www.esomar.org.

ESOMAR will hold a conference on the financial services industry on February 1-3 in London. For more information visit www.esomar.org.

ESOMAR will hold "Innovate!" a conference on research innovation, techniques and technology, on February 27-March 1 in Paris. For more information visit www.esomar.org.

The Northern California/Pacific Northwest Chapter of the Marketing Research Association will hold its annual Las Vegas conference on March 9-11 at the Treasure Island Hotel & Casino. For more information visit www.ncpnwma.org/calendar.html.

ESOMAR will hold its Asia Pacific conference on March 13-15 in Tokyo. For more information visit www.esomar.org.

Britain's Market Research Society will hold its annual conference on March 17-18 at the Barbican, London. For more information visit www.mrs.org.uk.

Salford Systems will hold its Data Mining 2005 Conferences on March 29-30 in New York and on April 4-6 in Barcelona. For more information visit www.salforddatamining.com.

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Pulsar Web

For respondents, the Internet has changed the face of marketing research. Years ago, “marketing research” might have meant to them a mail survey or a customer comment card. Nowadays it could just as easily be an online survey or a Web-based panel. The Internet hasn’t had quite the same kind of impact for client-side researchers, many of whom still work with paper-based tables and the occasional electronic document.

But that could change with the arrival of Pulse Train’s Pulsar Web, which offers table and charting using a highly intuitive Web browser interface. For users of Dimensions, SPSS’s suite of survey design and analysis

applications, it also provides not one but three different ways to pluck data from Dimensions.

The product is an evolution of desktop-based Pulsar, which first came out six years back. The desktop version still has the edge on speed, and is simpler to set up if the online analysis is destined for an audience of one or two. It also contains a few features that have not yet made it to the Web version, but Pulse Train promises they soon will.

Desktop interface in a Web browser tool

The Pulsar Web interface looks and feels identical to its desktop counterpart. In terms of speed, there is a

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slight lag compared to the desktop version, but not to the extent that it becomes annoying. There is no special software to install, although disappointingly, it refuses to work at all unless you use a recent version of Internet Explorer and Windows – a matter of company policy, I am told. But it does mean that users can connect immediately from the office, or even when working from home or out on the road, to what will always be the most up-to-date version of the data.

In Pulsar Version 3, the user interface, which was starting to feel cluttered and tired, has benefited from a huge tidy-up. Pleasing, crisp lines, graphics and intelligent use of screen space make the program very accessible to even occasional users, as does comprehensive drag-and-drop support. To the left of the main window, a resizable panel contains an

Pulsar Web by Pulse Train (www.pulsetrain.com)

Pros

- Very easy drag-and-drop table building
- Can populate with pre-defined batches of tables
- Customizable interface to add or hide complexity from users
- Works with SPSS Data Model, either directly or via an import

Cons

- Hierarchical datasets are a challenge
- No multivariate statistics or statistically-driven data visualization
- Can’t text search questions or tables
- Web program only works on Windows and only with Internet Explorer



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Explorer-style tree of folders and items, which are either the questions to choose, or the tables that have already been produced, according to which of the two views are flipped into. A larger panel, to the center and right, is where all the action takes place: defining then viewing tables and charts.

In the Variables view, you can drag and drop questions into the top or side of a table, or into the “planes” to create 3-D tables of any complexity you like. Variables are organized into folders, or “classes,” created by the programmers who import the data. It is vital that this folder structure is understood properly or you will quickly get frustrated tracking things down. Unfortunately, there are currently no text search capabilities in Pulsar to make finding things easier.

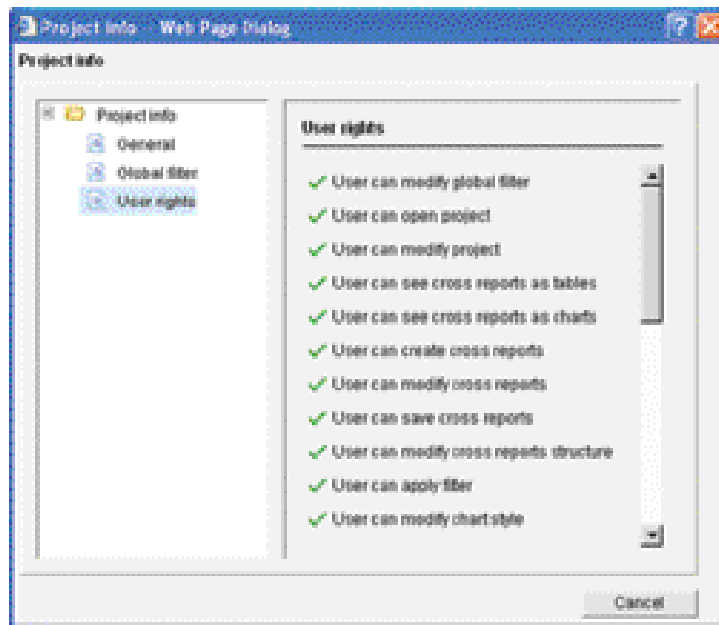
Smart charts

A table can be transformed instantly into a chart, and here another improvement emerges. Pulsar 3 uses a new charting engine to produce great-looking graphs with very little effort. While many struggle to get charts right in Excel or PowerPoint, this close-coupled tool overcomes most of the mundane but time-consuming problems of using tools not designed to handle crosstabs. Present it with a table containing frequencies and percentages and other values and it automatically filters out subtotals and other clutter you have to remove manually in Excel and the like.

Almost a data portal

Tables can also be output in several formats, including Excel worksheets and HTML Web pages. In fact, the tool is starting to take on the feel of a Web portal-building tool, for alongside the reports and variables, you can bind in other non-Pulsar documents such as a questionnaire as a Word file, examples of concepts or stimulus materials as Acrobat files and so on.

It also has individualized username and password-driven access control, which you can define, as an administrator, to determine who is allowed to view each survey, and even which



Less-advanced users can be given a simplified interface by deselecting any functionality you do not wish them to have.

program options you will allow them to use. For instance, you can lock down the tools available to novices so they can only use frequencies and percentages, and open up other statistics such as significance tests for power-hungry users.

The program lacks very little in the classic crosstab arena, but anyone looking for tools to help reveal latent trends, through correlation, regression, factor or cluster analysis will be disappointed: you would do better looking at mTAB, Espri or MI Pro, or, of course, SPSS. And although you can define new variables in the program, the crosstab interface should be next in line for a makeover – it is not as intuitive as the rest of the suite. Hierarchical data, never a strong point in the Pulse Train stable, is also a bit of a struggle, and is not always feasible.

The new Quanvert?

It is cost that has fueled the research industry’s mission into cyberspace, with falling response rates adding the odd boost. The opportunities for cost savings are not always so easy to see on the results side, especially since clients still usually want to see a full set of tables. Setting them up online also effectively doubles the DP work.

Clients tend to see this as a value-add, and not something they want to pay twice over for.

This was where Quanvert was ingenious, as it converted Quantum tables virtually automatically. For maybe 10 percent extra work, you got 100 percent of your tables loaded into a client-driven analysis tool. It is exactly why Pulsar Web is clever: it too has this ability to load in pre-defined reports as well as build new tables *and* save them.

The developers at Pulse Train have skillfully navigated through the shoals of the SPSS Dimensions Data Model to provide not one but three routes from Dimensions to Pulsar without anyone having to rewrite a single question label or tab definition.

Method one lets you run directly from the Data Model in real time, though once you exceed a few thousand records, the time the Data Model takes to deliver the data becomes so noticeable that it is better to use one of the other options. Method two lets you extract the data from the Data Model and then create an optimized database, rather like a Quantum database, which is inverted to give very fast performance.

Pulsar databases can also be built

from data imported via triple-s, which opens up error-free importation from a wide range of other manufacturers' data collection tools that support this standard, such as Confirmat, GMI and CfMC. Of course, it will also interact directly with Pulse Train's own Bellview data.

With its sights on the Quanvert user, Pulse Train has pioneered a Quantum importer, which it has called Leap. This somersaults over the yawning chasm in SPSS's Data Model treatment of Quantum files, which contains questions but no tables. Leap reads the Quantum spec and the Data Model to recreate both variables and tables. Bizarrely, none of SPSS's tools let you do this. Even more bizarrely, there is no equivalent Leap importer for Pulse Train's own Startab tabulation package: you would be better off starting in Quantum. However, as Leap is XML-based, which makes it highly adaptable, the importer could soon incorporate other tabulation sources too.

Making the Leap

Several Leap users I spoke with considered the import was virtually perfect, pointing out that the few items that it cannot recreate, such as net lines (or subtotals) and the occasionally mangled grid question, are again due to Data Model gaps.

Germany-based research firm GfK is using Pulsar Web in Germany, the Netherlands and Spain, and has been testing it at GfK-CRI Custom Research in the U.S. "We see more of our clients are asking for the facility where they can look at their own data," says Toni Lohmann, GfK operations director. "It makes it very convenient for them - and for us as well - to know we are all working with the same set of data. As we set up the reports for the client, we also set up access for the internal clients and sales people. With Quanvert we have to send out the database individually to our all our clients, which we do not have to do with this. We just update the data on the server."

GfK was seeking a more modern replacement for Quanvert that would

still allow it to publish sets of tables to clients. "Quanvert has not had a new interface for a long time," says Lohmann. "It takes a while to get used to it. This is not the case with Pulsar Web, which is very intuitive to use. It is a powerful tool and it provides charting which is not available in Quanvert."

Another attraction was that Pulsar Web could sit easily within existing business processes. GfK uses Quancept for its CATI and CAPI, and Confirmat for its Web surveys, and produces tables using Quantum. In fact, Leap was largely developed by Pulse Train at GfK's instigation.

Research International, another global agency, is also introducing Pulsar Web to some of its customers as one of a range of analytical and delivery tools. Jaw Stoute, IT/DP specialist in the firm's Rotterdam, Netherlands office, has worked on several Pulsar projects. Comparing the tool to Quanvert and also SPSS, he says: "So far, Pulsar seems like a happy

medium. It does not do some of the very complicated things but it is good for allowing clients to go in and do some additional tables, set filters and set sub-groups within their data. The drag-and-drop functionality makes it easy to use and the new charting engine allows for a lot more flexibility for people to customize the charts."

Stoute also had used Leap to convert Quanvert data. "We often predefine many online charts; it is fairly easy to make these in Pulsar Web. Leap is number one on my list of good things. There are some small translation limitations but overall, it works well."

Asked if using tools such as Pulsar Web can offer economies to either research company or client, Stoute says: "I do find that putting systems in place with clients does save me time. But that is not our primary concern: we see it as something we should do as a service to our clients, to allow them to get additional insights from the data." | Q

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Moderating and motherhood: strategies for success

Today, quality of life has become almost a cliché; we speak about wanting it, but reality sets in and “quality” shifts to “quantity” of life and time. As is written in *The Tao of Pooh*, “One cannot save time; one can only spend it wisely.”

Women tend to have special issues in this regard. We have never been better educated, which comes with high expectations, both self-imposed and communicated by others. And so, many of us marry, have children, own homes, and work in jobs that our fathers would have been proud to have. It’s all very heady and potentially satisfying. Except what we’ve done is take on a full-time job on top of already having the full-time job of raising children/running a home.

We’re told to “stop and smell the roses,” and so we put that on our list and, when we pass a flower, we slow down sufficiently to take a quick sniff, and then check it off our to-do list.

For my own part, I never planned to achieve “superwoman” status. Thirty years ago, I anticipated that I would get married, have children and quit work until the children were able

to fend for themselves (in truth, that doesn’t happen until they become parents or move a minimum of 25 miles away, but that’s another tale).

But something happened on the way to becoming a soccer mom. When I was pregnant with my first child, my then-boss made a “radical” proposal: “How about working two days a week doing qualitative research?” Back then, it was nearly an oxymoron to have a part-time career.

Believing that working two days a week wouldn’t get me reported to the Department of Child Welfare, I accepted. Over these 30 years, my work commitment has stretched to mega-full-time and I went on to have three more children. I tell my children that they can look forward to rich therapeutic sessions with their shrinks as they complain how their mother missed their baseball game, school play, parents’ night, science fair, etc. In truth, however, they seem to have survived the “abuse.” And I have gained perspective and knowledge that I pass along to other young women tantalized and also dismayed by the possibility of “wanting it all.”

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Balance is elusive and illusive. Just when you think you’ve got it, things go out of whack. Every Sunday, I would pore over the calendar and micro-manage every household chore, carpool and play-date. And every Monday, complaints and snafus would erupt. Though I don’t believe that life follows a how-to seminar, here are some suggestions for career moms that have worked for me.

1. Marry the right person, and stay married.

Actually, a tax attorney gave me that advice, saying that it is the best route to financial security. If this doesn’t happen the first time, you might want to try again. For me, having a full partner has made it possible to have children and a career. (For some women, not having the wrong person makes it possible.) No household job

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needs to have a gender attached to it. Both of you bring home the bacon, so both can fry it up.

No one ever asks a man how he is able to combine a career with having children.

2. Make technology work for you.

Become a specialist and proponent of online focus groups or online bulletin board techniques. Focus on the pluses of assembling a group from disparate geographies, while you stay in town.

New mothers who go back to work and want to continue to breast-feed should do it - even if your job involves travel. Wear dark, loose clothes. Pack a breast pump (they even travel well these days). Your baby will be very happy to see you when you return.

3. Embrace the phenomenon of the blurring of home/office.

Have a computer at home with full access to your work files. The distinction between home and office has become more blurred than the distinction between a supermarket and a drug store.

Some people resent a lack of distinction between home and business. They like to come home and know they're home, and not at the office. This sounds nice, but it's unrealistic and counterproductive. If you have an extra hour to do work at home, doing it can free you to walk your child to school in the morning or go to his band concert.

I know the counterargument: work is elastic. You'll end up simply putting in more hours and not enhancing the quality of your home life. Only you know if you can make this home/office blurring work for you.

4. When you spend time with your children, be sure to spend some one-on-one time with each one.

Don't always take them out as a group, especially on the weekends. Time spent with one child is worth much more than time spent with all of them together. It's less efficient, but more effective and satisfying.

5. When you're on the road, stay in touch.

I used to spend telephone time helping my children with homework.

Daddy also helped, but I think my kids thought it was pretty cool to get a call from mom. E-mail, of course, is a terrific mode of communication. Take pictures of cities you travel to; send them back via computer or just share them when you get home. If your child has a cell phone, get a family plan that allows free family calls.

6. Take your child to work...and take your work to your child.

Qualitative research typically involves a lot of travel. When each of my children was old enough, I took him/her on a trip with me. A couple of times, I arranged to have a babysitter take my child on a child-friendly excursion (museum, exhibit, etc.) during the day while I worked. And when you have downtime, you and your child can tour the city, share dinner, and take a plane ride home. My children fondly recall these special mini-getaways. And, it's worth pulling a child out of school for a day or two. Not sure how to find a babysitter? Ask the field service to recommend someone they know well who is trustworthy and wants to earn some



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Similarly, talk to your children about your work and what it means to you, to them, and the whole family. Talk to them about something of substance from a project you're working on (of course, don't divulge client confidences - you never know who they're repeating it to on the playground). Get your children's input - what would they do, is this a good idea, how would they change it?

Tell them what you like about your work. Tell them you know it's hard for them not to see you at all the school functions, and that you're proud of their independence and accomplishments. Finally, tell them that because you're working, the family will be able to take a nice vacation.

7. Be proactive about tightening a schedule to reduce nights away from home.

Today, it's common to work with women who have young children. I love the camaraderie of working moms, so be direct and say "I need to be back home, so could we start a lit-

tle earlier and work a longer day so we can take an earlier flight back?" Don't put a plan together until you've checked the flight schedule.

8. Carve out your own job description and become indispensable.

I'm not advocating that you tell your boss that you need to come in at 10 and leave at 3. At least, not from the get-go. Rather, identify what you're really good at, or could become good at, and slowly begin to implement it. If you see a need in the company or a new role for yourself, set goals and attempt to sell this new role. As you achieve success, you will be in a much better bargaining position to convince the company to take a pragmatic approach. If you can accomplish these worthy goals while maintaining an idiosyncratic schedule, you might break the 9 to 5 barrier.

9. Recognize that you are working for a better life and lifestyle.

If you are working so hard or long that it backfires and is actually impairing the quality of your life, your work

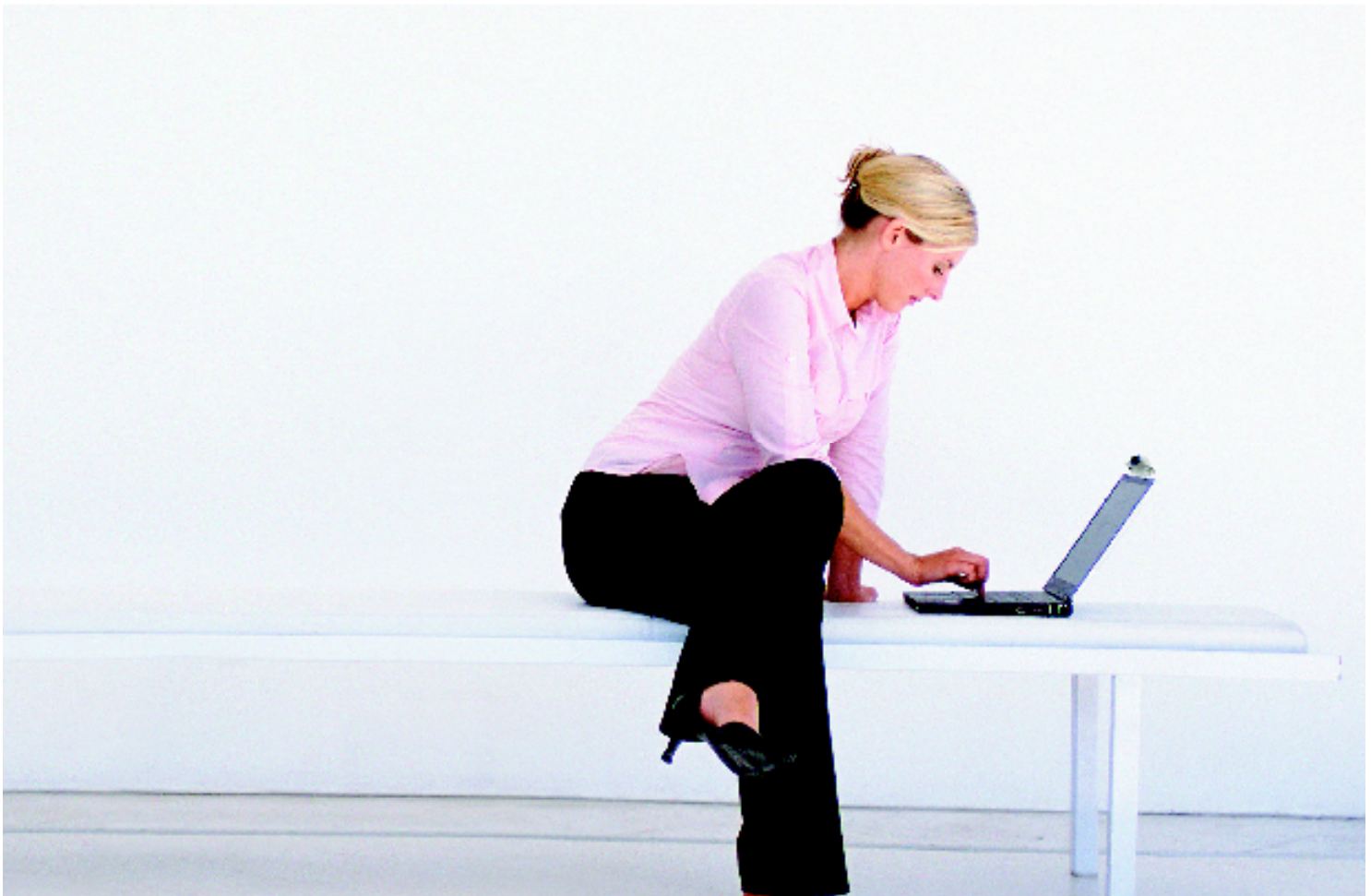
isn't accomplishing its goal and you need to make a change.

Recognize that any change you make doesn't need to be permanent. It is unrealistic to believe that one will have just one career. Multiple careers, changes of careers, and career pauses are becoming de rigueur.

It's o.k. to stop for a while; you're not quitting, just stopping. You should not confuse your career with your life. You'll know when it's right to answer the career call again.

10.?????????

I wanted desperately to provide 10 guidelines, not nine. Ten is such a good, even, round number. But because I'm tired, not feeling very creative, and have to get on an early flight tomorrow, I've decided that it is a show of strength, not weakness, to give up at number nine. Write to me if you see a tenth substantive rule for living life as a working mom. I'd love to hear from you. And I'll answer even if you send it outside the 9-5, Monday-Friday scope! | Q





Getting your money's worth with virtual targeting

It's all about bang for the buck. You have a database of, say, 10 million voters. Or 10 million consumers. Or 100,000 association members. The database is chock full of goodies. Not only the normal stuff, such as demographics (gender, age, income, etc.), and political information (party affiliation, donations given, primary and general elections last voted in), but a wealth of other personal information. For example, whether the list holder rents or owns his home, the number of private schools in the district, whether there is a working woman in the household, the number of children in the home, whether they have a DVD or have contributed to a health or environmental organization, whether they own a sports utility vehicle or subscribe to magazines, etc.

An election is looming, and in effort to reach swing voters or energize those who potentially support your core issue, your organization would like to hit those potential targets with a direct mail piece or a phone call. Something that will energize or sway them. Or perhaps you work at a credit card company and

would like to mail out a sampler to a million or so homes, but want fewer people to toss the piece in the trash without so much as a glance.

Let's say you are trying to reach swing voters in the state of Utopia, a swing state where things are not perfect. We know from those existing records that we expect about 20 percent of the list to be swing voters. You could mail out a flyer to all 10 million, knowing that the hit rate is about one-in-five. Or you could target only swing voters and dramatically raise your efficiency and lower your costs. Only you don't know who they are. So you can't actually target them. But you can build a model and make a very educated guess: You can virtually target them.

In addition to your primary database, you have, say, 10,000 records from which you are able to determine your target group. These records could be drawn from other lists, primary research where ID numbers allow you to identify back to the main list, or company databases. These records give you the ability to build a link between swing voters and char-

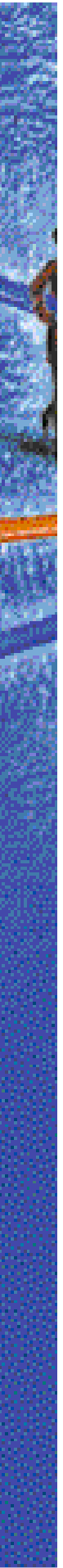
Editor's note: Michael Lieberman is founder and president of Multivariate Solutions, a New York statistical and market research consulting firm. He can be reached at 212-656-1711 or at michael@mvsolution.com.


acteristics to help define them. What virtual targeting will do is to build, and test, a profile of who your target is.

The basics of virtual targeting

What distinguishes our target group, swing voters, from non-swing voters? Are there characteristics which could be used to identify them? How can we make, on the basis of several individual attributes, one assessment on the likelihood a given person is a swing voter?

Virtual targeting answers these questions using a blend of statistical techniques that 1) identifies distinguishing characteristics of the target group and then 2) builds a linear equation that can be applied to each of our 10 million records to calculate a score. When sorted, the hope is that the group with the highest scores will





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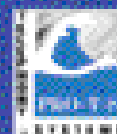
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Figure 1

Group Definition: Swing Voters
Utopian Voter Survey Sample
Significant variables

- Age Under 40=3 41-65=2 65+=1
- Attend Religious Services Regularly
- Bank credit card
- Contribution to Environmental Group
- General Election 2000
- General Election 2002
- High Private school attendance district
- Household party, 2=Mixed, 1=Republican, 3=Democrat, 0=No affiliation
- Married 1=Married, 0=Other
- Party registration, (1=Rep, 2=Dem, 3=Ind)
- Primary 2002
- Primary Election 2000
- Subscribed to one or more magazines or publications, responded to a survey, or entered a sweepstakes within the past 2 years
- Unemployment Rate in Utopia
- Working women in Household

be the more likely swing voters.

The first step

The first step is to take the myriad variables available to us and, using our known swings, discover which variables distinguish our target group from our non-target. There are two techniques that can be applied, regression analysis and CHAID - a chi-square technique that creates a tree-like output. The variables at the top of the tree are the most useful to distinguish between swing/non-swing, and as the variables run down the branch-

es their importance diminishes. Still, a variable that emerges in the top five to six branches is a good candidate for the final model.

A detailed explanation of regression and CHAID analysis is beyond the scope of this article. Basically, what each does in this case is to create a baseline variable - a measure of association - between our target group and characteristics available in literally hundreds of variables in the entire database. It enables a weeding-out process.

In our example, the swing voters of

Utopia, we have run through the first step in the virtual targeting. We have run a regression and CHAID, and the attributes shown in Figure 1 have come up significant.

Not surprisingly, many political variables, such as election frequency and party affiliation, have made it into the model. After all, what we are looking for is a potential politically neutral block of voters. Naturally, those who are not politically neutral (for example, primary voters) would be an evident distinguishing variable.

However, other not-so-obvious demographic and social attributes made it into the model. For example, if the person is married, lives in a district with high private-school attendance and has a bank credit card, chances are that his or her swingness can be more easily identified.

Step two

Now we know what should be placed into the model. Either the initial regressions or CHAID trees have told us. So the next step is to run the model.

There are a number of multivariate techniques that can be used for this. They can have fancy names, such as logistic regression or forecasting membership by way of using an exponential probability model. These work in the proper situations, and sound pleasingly fancy to satisfy the clients that we are adding enough oomph to the equation so that it will be sophisticated. In truth, many credit card companies run these techniques on their enormous databases with terrific results.

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Figure 2

Variables Present in Model Equation	Standardized Discriminant Coefficients
Party registration, (1=Rep, 2=Dem, 3=Ind)	0.31
Contribution to Environmental Group	0.10
Working women in Household	0.10
Unemployment Rate in Utopia	0.04
Primary 2002	0.00
Attend Religious Services Regularly	-0.05
Married 1=Married, 0=Other	-0.05
Subscribed to one or more magazines or publications, responded to a survey, or entered a sweepstakes within the past 2 years	-0.06
Bank credit card	-0.08
High Private school attendance district	-0.08
Age Under 40=3 41-65=2 65+=1	-0.08
Household party, 2=Mixed, 1=Republican, 3=Democrat, 0=No affiliation	-0.15
General Election 2002	-0.28
General Election 2000	-0.29
Primary Election 2000	-0.36

However, Utopia is a state that likes its meat and potatoes. And, to be fair, our interest is to produce clear results that can be easily back-coded to the main list. So here I choose to use discriminant analysis, a multivariate technique that measures our input variables and produces coefficients that give us a measure of how much each attribute discriminates between swing voters and those who are committed.

Discriminant analysis produces a discriminant function. That is, a linear equation where coefficients are multiplied against the respondent attributes to produce a score. Derived from the discriminant score, a likelihood of each group membership (i.e., swingness) is calculated based on who we know are swing voters from the smaller sample. To put it simply, the respondent fills out the form and gets a score, which is then compared to a chart to see if he has a good chance of being a swing voter.

As in all sophisticated statistical analyses, a blizzard of output accompanies the procedure. There are three outputs that we need to examine: the beta scores of the discriminant function (known as the raw coefficients), the standardized coefficients (which tell us which are the best variables), and the discriminant score coupled

with the percentage likelihood that score describes a member of our target group - swing.

The raw and standardized coefficients are used for descriptive and classification purposes, which I will

cover below. The discriminant score, when calculated afterwards, is the instrument used for future classification.

In the virtual targeting model there is one more measure which is not necessarily used with discriminant analysis. We are looking for the strength of the model as it specifically applies to identifying swing voters. The method is straightforward. The software, after it runs the analysis, gives each respondent in the analysis a score. We sort the list from highest to lowest score, then look at, say, the top 10 percent. The idea is to see how much better the sorted list is than a random sample. For example, with our Utopian list, we expect 20 percent of voters to be swing. If we take the top 10 percent of our sorted list, and 30 percent or them are identified swing voters, we can see that our list is 50 percent more efficient than a random sample.

Let's roll

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Not surprisingly the most discriminating factor is that the person is an independent. That is, not a member of either political party. The two other

groups are a religious group and there is a working woman in the household.

Not surprisingly, if a person has voted in the primary election in

Figure 3

Group Definition: Swing Voters Utopian Voter Survey Sample			
Variables Present in Model Equation	Raw Discriminant Function Coefficients*	Coded Answer to Question	Sum of Raw Discriminant
Party registration, (1=Rep, 2=Dem, 3=Ind)	0.75	1	0.75
Contribution to Environmental Group	0.73	0	0.00
Working women in Household	0.63	1	0.63
Unemployment Rate in Utopia	0.19	1	0.19
Primary 2002	0.16	3	0.47
Attend Religious Services Regularly	0.13	0	0.00
Married 1=Married, 0=Other	0.13	1	0.13
Subscribed to one or more magazines or publications, responded to a survey, or entered a sweepstakes within the past 2 years	0.12	7	0.83
Bank credit card	0.11	1	0.11
High Private school attendance district	0.00	1	0.00
Age Under 40=3 41-65=2 65+=1	0.00	1	0.00
Household party, 2=Mixed, 1=Republican, 3=Democrat, 0=No affiliation	-0.02	4	-0.06
General Election 2002	-0.04	3	-0.11
General Election 2000	-0.23	1	-0.23
Primary Election 2000	-0.36	2	-0.73
Discriminant Score			1.9950

*Used to calculate discriminant score

telling factors to determine swing is that the person contributes to a reli-

able household, he has a high recent coefficient. It is

Figure 4

SCORE	PROB
2.65	82%
2.64	80%
2.61	80%
2.59	79%
2.56	79%
2.37	76%
2.36	76%
2.36	76%
2.36	76%
2.36	76%
2.00	61%
2.00	61%
1.99	61%
1.99	61%
1.42	50%
1.42	50%
1.41	49%
1.41	49%
0.00	33%
0.00	33%
-0.01	33%
-0.01	33%

unlikely that he is a swing voter.

Virtual targeting is both descriptive and predictive. The descriptive side, illustrated by Figure 2, explains which factors rise to the top (or bottom) when running the model. This can be very interesting information. However, the real power of the technique lies in the simple ability to predict a person's group. This is where the real bang for the buck comes in.

The chart in Figure 3 illustrates how a given person receives a discriminant score. The raw coefficients (not standardized, as above) are multiplied by a respondent's answer, then tallied to create one score. At the bottom of Figure 3 this example's score has been calculated. It is 1.9950. So, is that good? Keep reading.

The final useful output in our example is a list of all discriminant scores and the probability of that score's respondent being a swing voter. This output can be sorted and displayed in a table which is partially shown in Figure 4.

This table is rather long, and functions as a look-up table. When one person goes through all the survey and



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Figure 5

% Total Sample	% Of Sample that is Swing Voters	Index (Base=20%)	% Better
0	0	0	0
10	41%	205	105
20	35%	175	75
30	31%	155	55
40	29%	145	45
50	27%	135	35
60	24%	118	18

has his score totaled, that score can be compared to scores on this look-up table to see what is the percentage chance that that person is a swing voter. In our case, 1,9950 has a 60 percent chance of being swing.

Call him.

How good?

The last, most important step: How

good is the model? Would it make a lot of sense to score all 10 million?

A reading of the chart in Figure 5 from left to right goes like this. When the known swing voters are scored, and the scores are sorted highest to lowest, what percentage of the top 10 percent are swing voters? The answer, according to this chart (second column), is 41 percent. We would expect

one-in-five (20 percent) to be swing if people were just randomly selected. So, if you divide 41/20, you get 2.05. Or, in other words, the model has more than doubled the efficiency of finding swing voters. The index, which multiplies this number by 100, is 205. That is high.

If you look at the top 20 percent of sorted sample, 35 percent of those are swing. Or, the model is 1.75 times more efficient with an index of 175.

As we work our way down the sample in order of score, the efficiency lessens. This is to be expected, since lower scores indicate less likelihood of being a swing voter.

Think about it. The organization is sending out one million pieces. If it does not run the virtual targeting, it can expect to reach about 200,000 swing voters.

If it does run the virtual targeting, and applies the scores to the general database, it can expect to reach 410,000 swing voters spending the same amount of money. That's bang for the buck. | Q



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The cool logic of chi-square

As many marketing researchers are aware, there are statistical tests built into the programs we use to show survey data. Most of these are set to operate at the 90 or 95 percent confidence level, and automatically test the difference between percentages in specified columns, as shown in the mock data example in Table 1.

As some marketing researchers are aware, the automatic test built into the survey programs is not the right test to use when there are more than two subgroups. You need a statistical test that will look at three percentages simultaneously, and that test is the chi-square (not to be confused with its cousin, the chi-square goodness of fit test).

The chi-square test looks at all the percentages and tests to see if what we have is different than what we would expect to have by chance alone. The logic behind it is actually deeper than this article will go, but, at one level it is cool.

Take a look at the mock data in Table 2 as an example. We want to

know if the three percentages differ significantly statistically at the 95 percent confidence level. If they do, we will hypothesize that awareness decreases with education level.

As Table 2a shows, the first step is to eliminate all the things that make the table pretty, and (oddly enough), to eliminate the percentages that we are interested in test-

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ing. We also add a new row. Since awareness is a zero-one concept (you are either aware or you are not), we add the number not aware, which we get just by sub-

Table 1: Would you eat the product with a fork?

	Women		Men
Base – total per group	(155) %		(148) %
Yes	44	s	66
No	54		32
Don't Know	2		2

s = statistically significantly different at the 95% confidence level

Table 2: Awareness of Our Bellissimo by Education Level Among Users

		Education Level		
		High School or Less	Some College/Tech School	College Grad or More
Base – total per group		(501) %	(200) %	(302) %
Aware of Our Bellissimo	# %	250 50%	80 40%	91 30%

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Table 2a: Awareness of Our Bellisimo by Education Level Among Users

	High School or Less	Some College/Tech School	College Grad or More	
Aware	250	80	91	Row Total = 421
Not Aware	251	120	211	Row Total = 582
Totals	Column Total = 501	Column Total = 200	Column Total = 302	Total = 1003

Table 2b: Awareness of Our Bellisimo by Education Level Among Users

	High School or Less	Some College/Tech School	College Grad or More
Aware	210	84	127
	250	80	91
Not Aware	291	116	175
	251	120	211

tracting the number aware from the total. Next, we add the rows to get totals, and put the bases in as the column totals.

The chi-square test actually compares all the numbers in the cells to the number that you would expect to be in the cell by chance. You get this number for one cell by multiplying the row total by the

column total and dividing by the total. For the first cell of 250, we would expect $(421 \times 501) / 1003 = 210$ to be in it. For the Some College/Tech School + Aware cell, $(421 \times 200) / 1003 = 84$, etc. The idea is neat. Table 2b shows the actual numbers and the expected values in boldface.

That's it. There is no need to go

through the whole formula for chi-square, since it can be found many, many places, and the rest of the logic of the test is the same as for all statistical tests of difference. (Compare the obtained chi-square to the table value of chi-square that one would expect if the percentages did not differ; if it is bigger, the percentages differ. If it is not, they do not.)

The logic compares the actual cell values to the cell values you would expect if the percentages do not differ, given that the row totals and column totals are what they are. You are comparing all of the percentages at once, but the logic is based on the number you expect to see in each cell. Better still, you can calculate that number and see for yourself, if you are so inclined.

Is our example chi-square significant at the 95 percent confidence level? It certainly is! Of course, it was constructed to have large differences, so that is really no surprise. | Q

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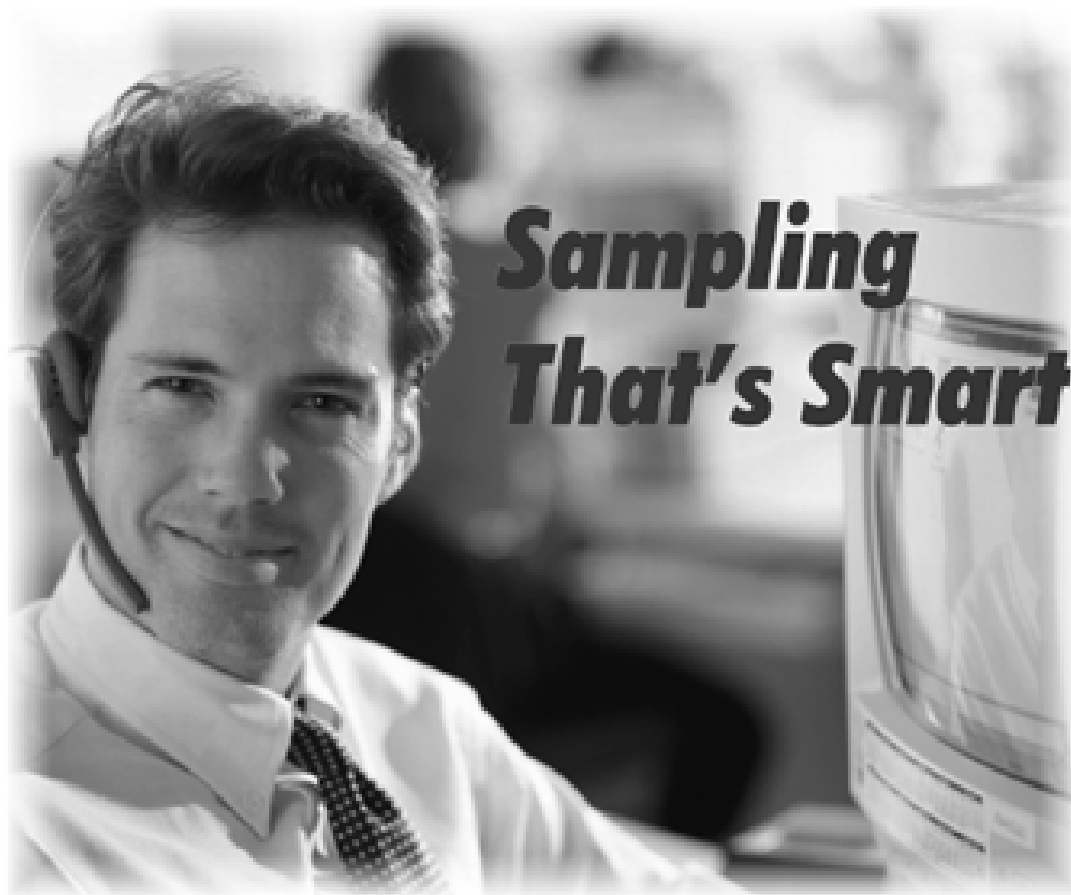
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You are project manager for a telecommunications company's customer satisfaction survey. To put the survey in the field, would you send an army of door-to-door interviewers across the country? Or perhaps would you arrange for home-based interviewers to call customers? Or would you simply hire a centralized, computerized phone room to do the job?

For today's project manager, the answer is clear. In fact, it's hard to imagine what it must have been like to conduct quantitative research before AT&T pioneered computer-assisted telephone interviewing (CATI) with a customer satisfaction survey in 1971.

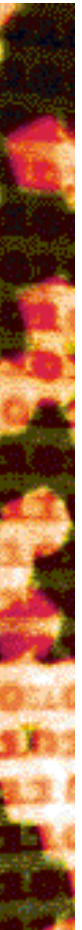
I think it is fair to say that without CATI, the field of marketing research would not have the influence it does today in corporate boardrooms, political backrooms and newsrooms.

And I bet tomorrow's market research professionals looking back to the CATI era will find it hard to imagine how the research business could have run before the Internet.

Recruiting Internet panels for text-based scripts is now fairly common and represents simply a shift of the questionnaire from the CATI operator's computer screen to the survey participant's computer screen - much as CATI itself shifted pencil-and-paper surveys into an automated, centralized system.

Respondents react well to broadband-based research approach

Editor's note: Adam Froman is president of Delvinia Interactive, a Toronto research and marketing firm. He can be reached at afroman@delvinia.com or at 416-364-1455 ext. 222.



Something new

But the most exciting new Internet survey technology is just a little further out on the horizon. Broadband Internet platforms will offer something completely new: they marry the consistency of well-crafted telephone (and now, text-based Internet) scripts with many of the visual and interpersonal advantages of focus groups.

Almost anything you want the customer to see or hear - TV pilots, virtual 3-D images of products under development, radio jingles - can be tested on the broadband Internet. According to Stephen Popiel, senior vice president of Millward Brown Canada, "Broadband data collection technology makes polling the nation easier, faster and more convenient for participants and researchers alike."

Popiel came to this conclusion

after overseeing a controlled broadband research experiment funded by an applied research grant from the Department of Canadian Heritage and CANARIE Inc., a non-profit government and private partnership advancing Internet technology in Canada.

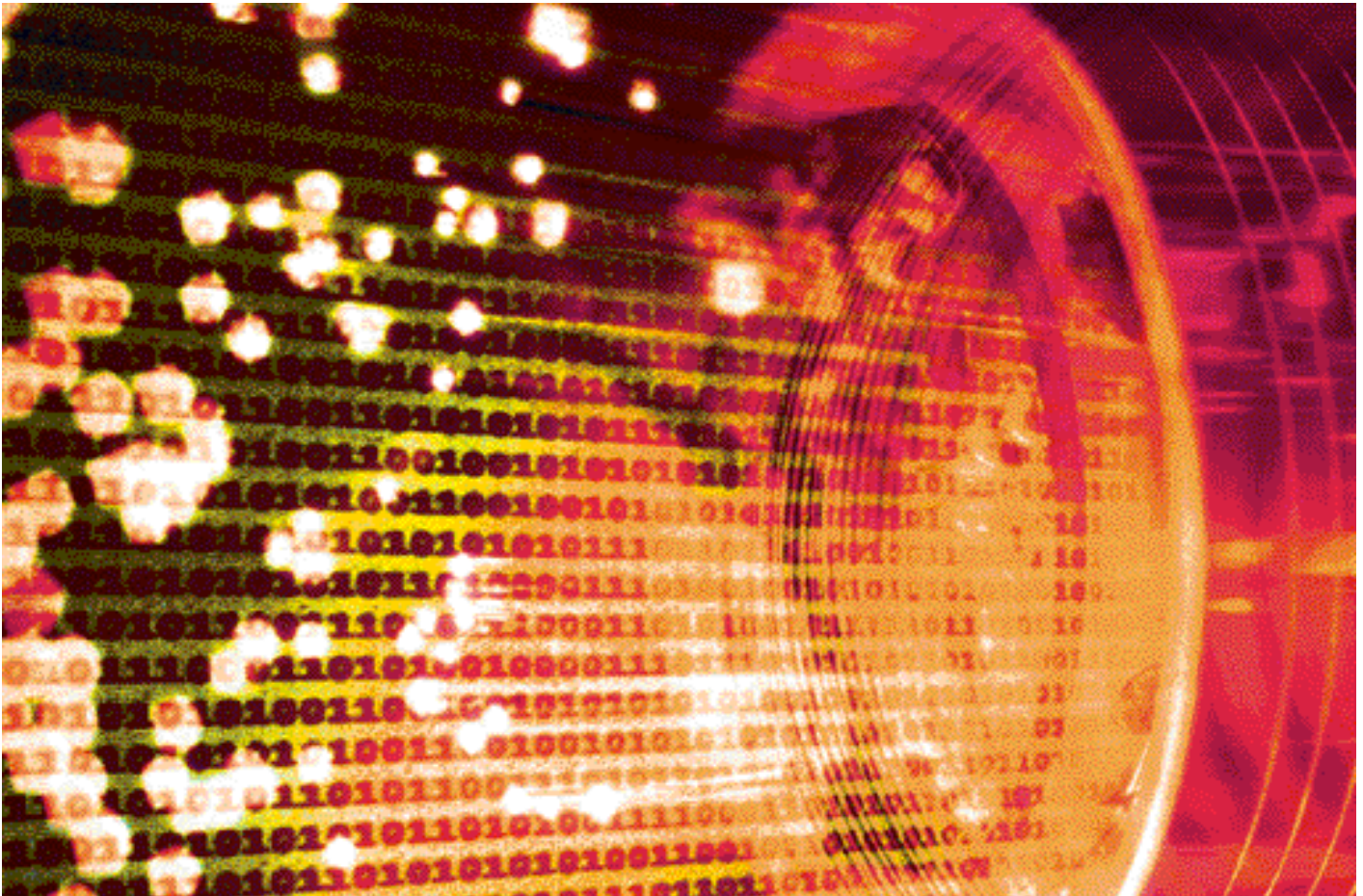
The experiment was straightforward. Nissan and Expedia.ca each supplied a television commercial which was tested using Millward Brown's traditional LINK ad testing methodology and standard marketing research industry recruiting and data analysis techniques. Those results were compared with results from an online version of the same ad test, which used Delvinia's AskingMedia broadband platform to turn LINK into an online tool.

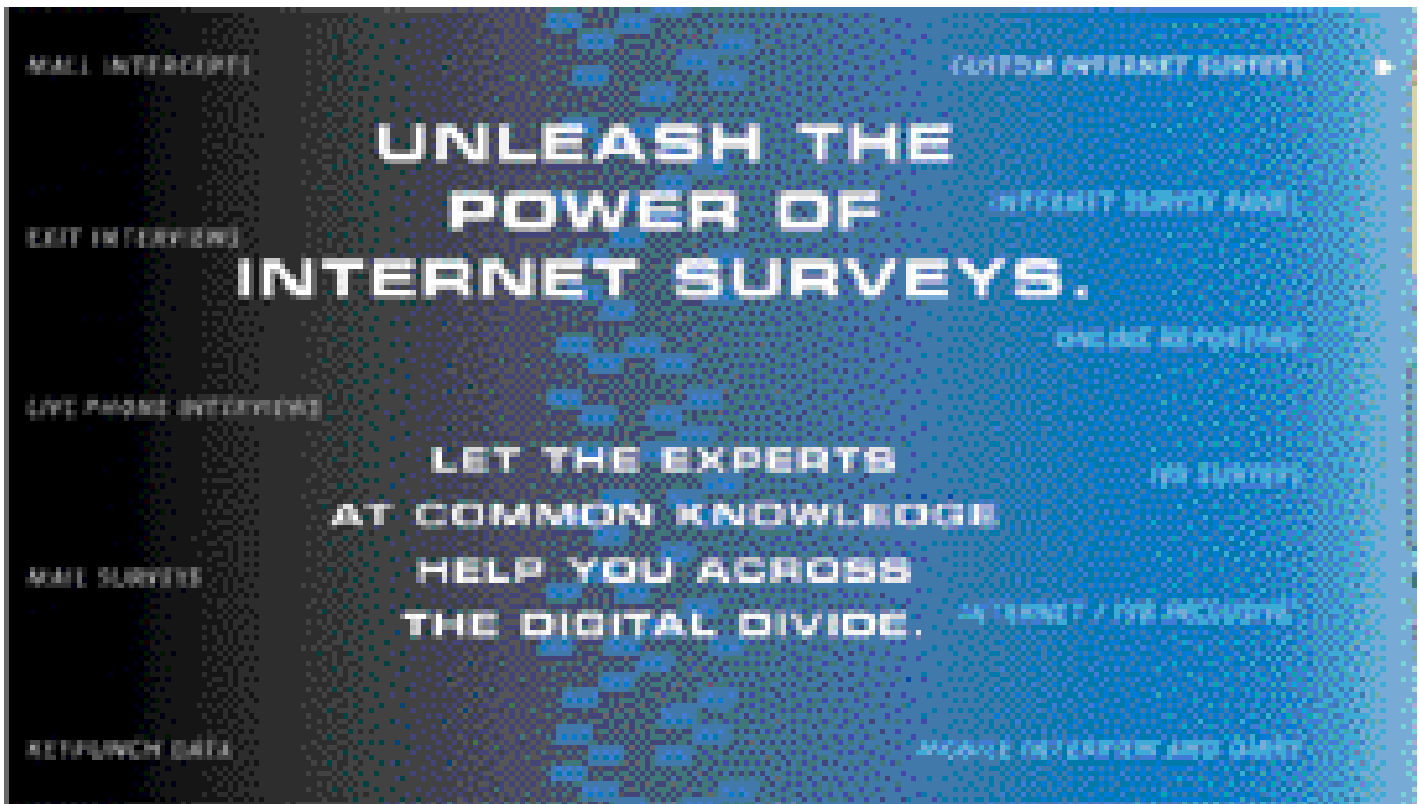
As always in marketing research, the success of the offline and online ad tests depended on recruiting. One hundred people were recruited

for each test. For the offline LINK test, standard telephone recruiting was used. Respondents were paid \$50 to come to a central Toronto focus group facility to view and react to a TV commercial. The optimum time frame to recruit 100 respondents for an offline LINK to a central location is two weeks.

Obviously, for the broadband test we screened for high-speed Internet access. With cable and DSL penetration now nudging 50 percent in Canada, this was not an obstacle and will be even less of one as more people get online and existing users update their Internet technology (70 percent of Canadian households and 95 percent of businesses are online).

Among the project team, however, there was some concern that one qualifier could indeed prove an obstacle for the online test. While Expedia required a general sample





of Canadians, for Nissan we had to screen for Canadians who intended to make an automotive purchase within a particular time frame and budget - indicators with an incidence of less than 1 percent. A total of 20,000 recruiting e-mails we sent out on nationally. How long do you think it took to find our sample. Two weeks? Two months? Hardly: in one day we had our 100 online completes.

Here's what those respondents saw. After answering screening questions to establish that they fit our profile, a video hostess introduced the survey. (In our test, the hostess was not live and interactive, but the technology is in place to handle that requirement - cost would be the only barrier.) Respondents we streamed video of a commercial and by moving their cursor they were able to react to it in real time. They then answered questions on the product attributes and the ad itself, following a rational skip pattern.

To lower stress for the companies

testing creative, our AskingMedia broadband platform streams video in such a way that it can't be saved or replayed later, ensuring the security of the creative. The attractiveness of the creative is protected by Macromedia's Flash technology, which reduces image drop-off and so enhances viewing pleasure.

Make it user-friendly

In addition to evaluating consistency between online and offline methodologies, it is important to ensure that the survey tool is at least as user-friendly as current industry standards. Most offline research uses a CATI approach, which puts no response burden on participants. However, Internet-based surveying has increased significantly over the past five years. Yet simple inspection of most Internet surveys suggests that little thought has gone into the ergonomics or user-based principals that would make these systems simple and easy for respondents to use. It appears instead that, aside

from the use of radio buttons and the odd sliding response scale, most people simply translate a word document into an HTML survey.

One of the main goals of the broadband tool developed for this use was to build a tool that made it easy for respondents to complete a survey. At the end of the Nissan survey a series of questions probed participants about the actual survey experience.

A majority felt that this survey was better than surveys they have done in the past. Fifty-one percent felt that the survey was better and an additional 33 percent felt it was the same. Only 8 percent felt it was worse than other surveys they had completed online.

More specifically, respondents found the survey to be easy to use, easy to navigate and just under half were very satisfied with the download time. Roughly two-thirds of all respondents (60 percent) found the survey easy to complete. Moreover, three-quarters (73 percent) found the survey easy to nav-

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igate through. Less than half (48 percent) were very satisfied with the time it took for the video to download, but this is as much a function of computer hardware and limitation of the Internet at present as it is the survey tool.

Some have suggested that online surveys should be the same as traditional paper-and-pencil surveys and contain as few embellishments as possible. This implementation contained a virtual hostess who could be accessed at any time and answer questions. Response to the hostess was favorable: 58 percent had a very positive impression of the it. Most of the responses indicated that the hostess was helpful. A minority felt that it was not needed. Very few (3 percent) indicated a preference for an in-person hostess.

Respondents were also asked about their impression of the user interface (the look and feel of the hostess). A majority (52 percent) had a very positive impression of the interface and a third (33 percent) had a somewhat positive

impression. Responses to the interface focused on such things as ease of use (27 percent), design (18 percent), and the fact that it works well (12 percent). Seven percent mentioned that it was fast/quick. Nonetheless, not all feedback was positive. Some felt the screen was too small (8 percent), or download time was too slow (5 percent) or the survey was too long (4 percent), which is technically not part of the interface.

One caution

While Popiel feels that in the main, there is no reason to suspect that the online and offline samples are not comparable, he issued one caution for researchers comparing broadband ad testing results to databases of results from telephone interviews or anecdotes from focus groups: respondents to broadband surveys, like mailed ones, answer alone and so tend to score emotional factors lower than do people reacting to another person. But Popiel says that since the pattern of

responses over a whole questionnaire is the same, it's easy to adjust online scores with an algorithm for comparison with existing offline databases.

Hard costs for online ad testing with a national sample are about the same as for offline testing in one location. Soft costs are lower for both the market research firm and their client — since everything happens faster, less staff time is required to manage the project.

There is always a turning point in the adoption cycle of a new technology, when novelty attains ubiquity, when technology becomes commodity, when the discretionary morphs into the necessary. There was a point at which the toaster ceased to be a technical innovation and became an appliance.

For broadband ad testing, that turning point is fast upon us. I know of several firms conducting broadband ad tests this year. I predict that by 2010, when we say a survey is “in the field,” we’ll mean it is online. | Q



Delivering results

As the shipping/delivery service industry has grown and new players have entered the market, the United States Postal Service (USPS) has become keenly aware of the need to continuously improve. In an industry with numerous choices available to the consumer, the Postal Service focuses on three objectives that are key to its success: improving customer service, maintaining a high-quality and consistent post office environment, and operating at a high level of efficiency.

To help determine where it stands in relation to each objective and how it can improve, the USPS implemented a mystery shopper program. As with

most mystery shopper programs, the Postal Service's program is designed to help its frontline employees strengthen the service they give to customers and accurately perform the standard operations of the company. The mystery shoppers anonymously visit post offices, role-playing as customers, while performing specific transactions,

recording observations and evaluating the outlet.

The information gathered by the mystery shopper is used to assess whether each site meets exemplary customer service standards, provides highly accurate transactions, and complies with the basic standards of quality set forth by the USPS. The Postal Service combines these results with results from its own quality service and accuracy research to provide a more integrated picture of what's happening on the front line where customers actually experience the USPS brand.

Mystery shopping improves the customer experience for Postal Service patrons

Editor's note: Colleen Maher is corporate communications manager at Maritz Inc., St. Louis. She can be reached at 636-827-4380 or at colleen.maher@maritz.com.



Evaluating the knowledge of the salespeople and the accuracy of each transaction are key components to increasing revenue for the USPS. By identifying opportunities to increase knowledge of products and services among its workforce, the Postal Service can develop better training programs. “The mystery shopper program helps standardize transactions and identifies key areas for improvement among USPS frontline workers,” says Richard W. Rudez, manager, retail operations, United States Postal Service. “This helps give customers a uniform experience regardless of the retail outlet they visit, which helps build customer trust and loyalty.”

The same principles of consistency apply to appearance. “Customers should see the same information and point-of-purchase displays at each post office,” says Rudez. “Not only does this better educate and influence customers in their purchasing decisions, but it also reduces the amount of time

customers have to spend at retail outlets.”

Mystery shoppers also evaluate whether all the necessary signage, and specific point-of-purchase displays are present, as well as whether Postal Service representatives are compliant with basic uniform standards.

Determine compliance

The overall objectives of the mystery shopper program are to evaluate selected post offices to determine compliance with procedures and identify areas for improvement. To implement this program at approximately 8,800 retail units, the USPS contracted with the Virtual Customer Division of St. Louis-based Maritz Research, which provides mystery shopping services nationally and internationally. “Maritz conducts approximately 70,000 mystery shopper visits annually at select USPS post offices,” says Gina Wiseman, vice president, Maritz Research.

The program is designed to ensure high-quality, accurate results by adding several levels of accountability. “For example,” says Wiseman, “the USPS shops the top revenue-producing offices in each district. Additionally, individual post offices are selected randomly to receive additional shops. Each post office in a district will have an equally random chance of being selected and can be shopped up to two additional times each quarter.” A senior statistician at Maritz designs and implements a comprehensive sampling plan for a proportionate amount of shops each quarter based upon the size of the district. This ensures accurate results and eliminates overshopping of smaller districts and neglecting larger districts. “A program of this size must have a highly developed and structured framework to ensure high-quality, actionable results for the USPS,” Wiseman says.

Accurate data collection is crucial to any research project; however, mystery



shopper programs have additional areas of concern due to possible human error and bias. "We address these issues by a) developing questionnaires that are easy to use, b) collecting an accurate sample size for each district, c) properly preparing each shopper for his or her shop, and d) holding each shopper accountable for accurate results," Rudez says. Maritz and the USPS continue to update mystery shoppers throughout the program by providing them with scenarios and questionnaire exercises each quarter.

Rudez says the questionnaires are designed to eliminate individual bias by asking straightforward questions with little room for interpretation and are assessed upon completion.

Questionnaires consist primarily of diagnostic (yes/no) questions, if/then

questions related to a specific response or situation, and mystery shopper comments. For specific diagnostic questions, if the evaluator responds "no," he or she is expected to provide detailed comments as to the reason for the response.

According to Wiseman, Maritz has a growing database of 50,000+ mystery shoppers and more than 4,400 prepare for USPS' mystery shopper program using materials developed by the USPS and Maritz. Shoppers must complete a project review, including information materials and program-specific questions, before being allowed to participate in the program.

The information includes the following:

- scenarios explaining how the shoppers must conduct their shops;

- rules the shoppers must adhere to when conducting their evaluations;
- evaluation guidelines, ensuring all data collected is uniform and easily translatable into actionable client data.

The mystery shopper must send a provided sample parcel of a specific size and weight, which is calibrated before mailing. After conducting the transaction at the post office, the shopper reports on the amount charged for the package in addition to the shipping options offered by the retail associate.

Make it actionable

A key to collecting any type of data is making it actionable for the client.

"Our goal is to deliver understandable information that the USPS can use to improve its service and operations," says Wiseman. "The results of each completed mystery shop are distributed to all levels of the Postal Service via a highly customized reporting Web site, developed by Maritz.

District coordinators share the results with each post office and its employees. They can quickly and easily use the results as a training tool to improve customer service." Each quarter, executive summary reports are developed at the national and area levels. These reports provide the USPS with a graphic and narrative report comparing actual results against performance goals, highlighting areas to improve and maintain. Additionally, they highlight the areas where the USPS is doing well.

"The mystery shopper program has helped the Postal Service evaluate how we are performing in the retail lobby in those areas that are most important to the customer," says Rudez. "By focusing on factors like wait-time in line, retail associate courtesy and sales skills, we can assess and improve retail operations and proficiency and ultimately improve the customer experience."

In fact, the USPS recently awarded Maritz Research a Quality Supplier Award for making a positive impact on supply chain management, and achieving positive, bottom-line results. "To know that we are helping deliver those kinds of results makes us all proud," Wiseman says. | Q

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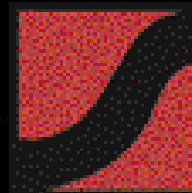
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Taking a page from the offline world

Monitoring the health of prescription drug advertising can be challenging for a variety of reasons. Finding the target audience – doctors with sometimes rare specialties – can be expensive and time-consuming. The message content of the advertising can be complex, often requiring multiple pages of explanation and proofs of performance. And powerful research diagnostic instruments, which are essential for pinpointing areas of an ad that require creative treatment, are critical. For all these reasons, testing multi-page drug advertising on the Internet would appear to be contraindicated.

For a number of doctor-targeted ad tests conducted by our firm in the past few months, recruiting doctors for an online interview was found to be significantly faster and cheaper than conventional offline tests, while producing comparable insights and conclusions. Ad page length, running up to six pages, was found to be correlated with online measures of breakthrough power in an intuitive way, with a high degree of face validity, despite the fact that the Internet removes the tactile experience of holding a paper journal in your hands. And a way has been found to replicate online the diagnostic insights which come from tracking the reader's visual path through the ad via eye-tracking.

Reduced cost and timing

Doctor interviews are among the most expensive and time-consuming for advertising researchers to collect. High incentives are needed to motivate doctors to not only take the time to do the research interview but also to travel to a central location where the interviews are collected. This can be quite a problem when you are looking for specialists who may be spread out geographically, perhaps far from advertising research facilities that have specialized equipment for eye-tracking. This factor

adds to the time as well as the money needed to collect these interviews.

The graph in Figure 1 demonstrates the potential advantage, in terms of cost and time in field, for online doctor interviews compared to those conducted offline. This is based on five ad tests among doctors for which parallel offline tests were conducted.

The bottom line is that online testing among doctors can reduce research costs by nearly 40 percent and reduce the turnaround time for a study by almost one-third when compared to similar research designs for offline research.

A prescription for testing multi-page print ads online

By Charles Young

Editor's note: Charles Young is CEO of Ameritest, an Albuquerque, N.M., research firm. He can be reached at 505-856-0763.



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Incidentally, previous “research-on-research” work by Ameritest (reported in Young, 2002) showed that results from online print ad tests are very similar to those conducted offline. Actually touching the paper the ad has been printed on does not seem to be important. It’s the creative idea that matters!

Multi-page effectiveness

The amount of information in a doc-

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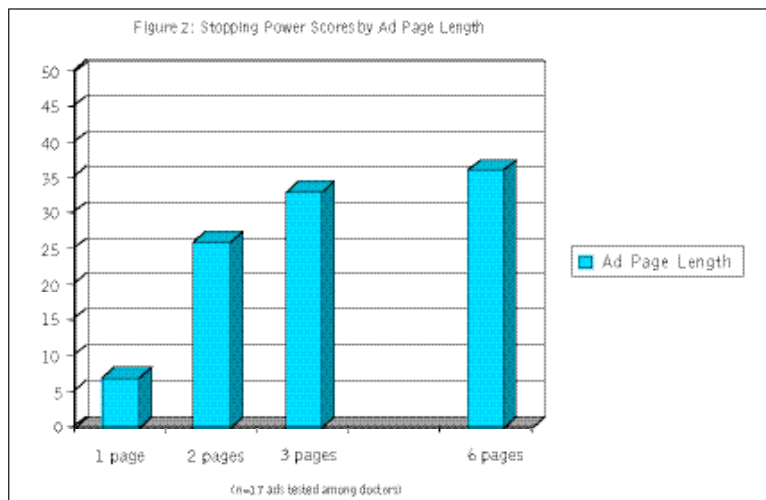
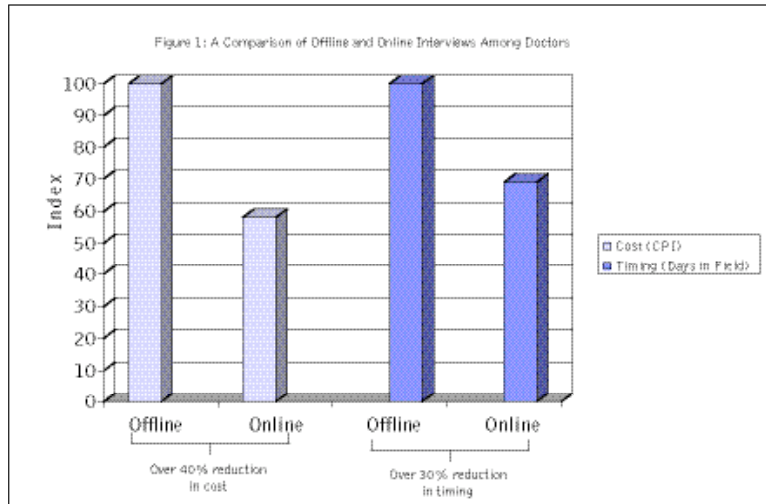
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tor-targeted ad is usually much higher than it is for consumer advertising. It usually contains highly technical language describing specific product claims and support points, graphical demonstrations of quantitative clinical results, visuals dramatizing the emotional benefits of successful patient treatment, as well as therapeutic qualifiers and legal disclaimers. Frequently, multiple pages of advertising space are needed to carry all this content.

From an advertising research standpoint, one key measurement issue is to understand the value of an expensive multi-page media buy. In theory, we would expect that purchasing more pages would lead to higher levels of attention among readers. In practice, that is exactly what we found (see Figure 2).

The stopping power of the adver-

tising is consistently related to the number of pages in the ad, with single-page ads getting the lowest scores on average and the ads with the greatest number of pages getting the highest scores.

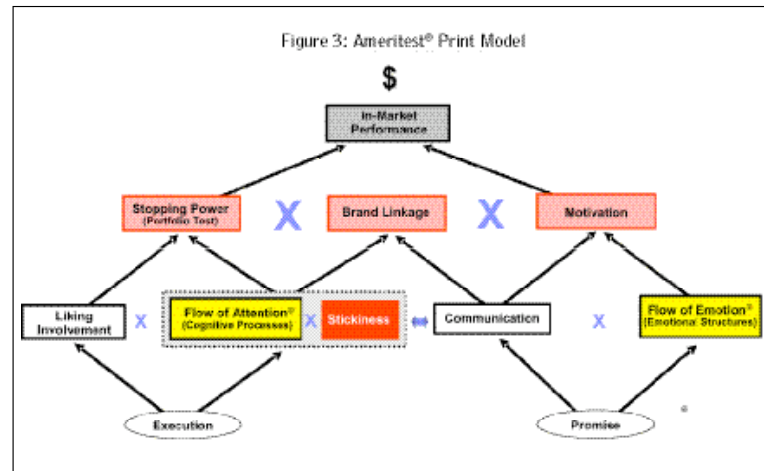
Importantly, this does not mean that the creative strength of the execution doesn’t matter. Quite the contrary! When we control for the number of pages, we find substantial discrimination between the performance of individual executions. It’s just that page length is one of the variables you have to take into account when interpreting advertising test scores.

How do we measure stopping power on the Internet? It’s simply a measure of the attention-getting power of an ad when it has to compete for the reader’s attention against other ads in a clutter portfolio. It is

measured by giving respondents a portfolio of print ads to look through. In the Internet version, the test ads are shown electronically, with the respondent having the freedom to click forward and backward through the portfolio and spend as much time on each ad as desired. After looking at all the ads, respondents are asked to recall all the ads they found to be “interesting.” Respondents recalling the test ad with interest, as a percentage of the total number of respondents interviewed, are counted toward the stopping power score.

A practitioner’s heuristic model

Stopping power is, of course, only one measure of advertising performance. Other measures may also be important, such as how well branded the ad is, what it communicates, how “sticky” it is in terms of holding reader attention over time, how much emotion it generates, how likeable it is and whether it motivates the reader. We believe that all these mea-



sures are relevant to understanding the complex, multidimensional aspects of advertising effectiveness. Arguing for one measure over another frequently sounds like the fable of the three blind men arguing about the elephant. So, in the online interview we collect them all.

The problem for modern researchers is one of synthesis. How do you keep track of, and integrate your thinking about, these different

views of the advertising? As shown in Figure 3, Ameritest has constructed a heuristic model - a teaching model - to provide a roadmap for interpreting all that data. The interested reader is referred to Young (2001) for a complete description of this approach and to Young and Cohen (2004) for an account of how key measures in this model were validated against the judgment of seasoned creative directors.

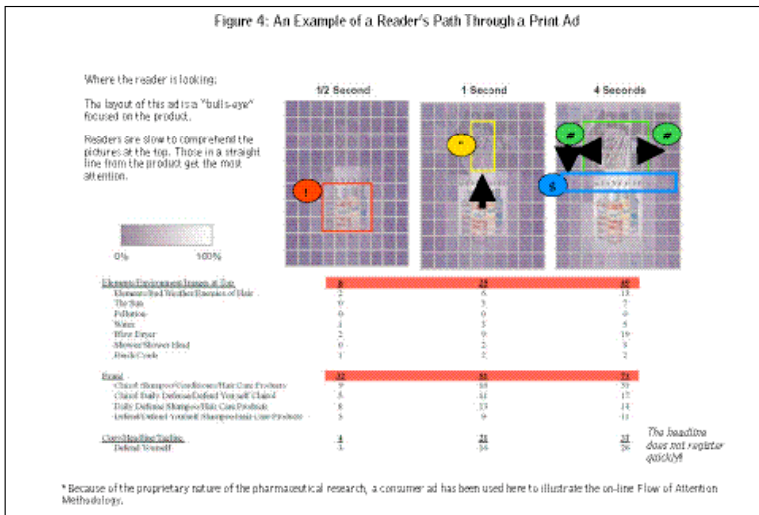
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Figure 4: An Example of a Reader's Path Through a Print Ad



Here's a brief tour of the model. In it, information is arranged in a hierarchy that bridges the divide separating report card systems and diagnostic systems. At the top is what pre-testing is supposed to predict: in-market results. One level down are the evaluative measures that provide the report card portion of the analysis. Two levels down are

the diagnostic measures that are correlated with, and therefore explain, the evaluative measures above. The arrows in the model highlight the primary relationships or correlations between the different variables.

Essentially, the model says that for any print ad to be effective it must accomplish three things:

- It must get noticed and attract a reader.
- The reader must know the identity of the brand sending the advertising message.
- Once the ad has the reader's attention, it must motivate - e.g., generate an interest in prescribing the drug.

Other variables in the model are important only insofar as they help to explain the variables of stopping power, brand linkage and motivation - they are diagnostics. For example, stickiness is not important in and of itself, but it is a key component of the flow of a reader's attention through the ideas and images in the ad.

Invent other methodologies

For offline print testing, the "standard" of diagnostic advertising research is eye-tracking. Unfortunately, this is not an option for online researchers. Yet if we understand why eye-tracking information is so useful as a diagnostic, we invent other methodologies for approximating this information in an online environment. Our approach is to use a patented, Internet-age version of the classic tachistoscope (or t-scope) methodology. It works because inside every computer ever built is an extremely accurate clock - it is fundamental to the way computer processors work.

For the eye-tracking part of the interview, the ad is shown to the respondents for brief, controlled periods of time. The first exposure is a half-second (just long enough for most respondents to see only one thing in the ad); the second exposure is for one second; and the third exposure is for four seconds. After each exposure, respondents are asked:

- What did you see?
- Where exactly in the ad were you looking? (This is recorded on a response grid.)
- If this ad was in a normal magazine, how likely would you be to continue looking at or reading the ad?

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The answers to these questions provide the following insights: the ad's entry point or hook (which is key to understanding stopping power), the order in which the respondent "shops" the information in the ad (which is key to communication), the stickiness or holding power of the ad, and how long it takes respondents to register the brand identity. Figure 4 shows an example of the path of a reader through the page of a print ad.

If necessity is the mother of invention, then serendipity may be the father of scientific experiment. With experience we have learned that this approach actually has one advantage over eye-tracking. While the output of this process is something that looks very much like an eye-tracking map, we are not measuring behavior, not simply where the eyeball is pointing, but rather we are measuring perception - the movement of the mind through the ad. With verbatim comments about what the consumer was thinking while they were looking at a particular part of an ad, we gain additional insights - e.g., how quickly a respondent recognizes a celebrity, or what message is taken away in the first second of glancing at an ad.

Finally, additional tools can be built into the online interview to make this channel of information-gathering more effective. For example, for copy-intensive parts of an ad, a rollover "magnifying glass" can be used to make it easy for readers to study even the legal disclaimers in the ad - if they are so motivated.

Prognosis looks good

The prognosis looks good for the future of online print testing of pharmaceutical advertising. Internet testing generates the performance measures that make intuitive sense - and line up with offline results, as we have reported in other studies. It also provides the researcher with powerful diagnostic measures that explain these perfor-

mance measures and help contribute to the process of optimizing advertising executions. Finally, by substantially improving the cost/value equation, it is more practical than ever before for quantitative researchers to play a valuable role in the birth of healthy advertising.

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There are benefits to both

When bulletin-board focus groups (BBFGs) started gaining popularity, some qualitative researchers were quick to point out why online groups are not the same as “real groups,” implying that online groups were somehow inferior. Many articles and discussions focused on comparing BBFGs with in-person focus groups, extolling the virtues of each and but often highlighting the deficiencies of BBFGs. Champions of online groups countered with long lists of potential benefits as an apology for the “deficiencies” of online research. However, in practice, the trade-offs one does make are very often offset by the advantages of online groups.

In writing this article, the intention is not to diminish the validity or usefulness of focus groups but to challenge some of the assumptions and beliefs about in-person groups and to demonstrate some of the less publicized attributes of bulletin-board groups. Most experienced, trained moderators know how to use non-verbal cues, reduce the impact of dominant respondents, make respondents comfortable in an artificial environment, probe properly, and encourage timid respondents to participate. However, this does not mean that these challenges do not exist, just that good moderators have developed techniques for coping with them.

Challenges of in-person groups

Research observers need to see respondents’ facial expressions and body language to gain an in-depth understanding of what respondents are thinking.

As a researcher, RIVA- and NLP-trained, I find it an interesting challenge to read respondents. Sometimes I do get non-verbal clues that indicate when it would be effective or inappropriate to drill down, but the flow of the conversation is my greatest hint about when to probe or change direction. Unless

one is particularly adept or well-trained at reading body language, how accurate the interpretation is likely to be? When it comes time to write a report, I report what my clients and I hear or what I can glean from audio and videotapes.

The ability to manage groups is an essential part of being a good moderator; reading body language helps moderators do this. Reading non-verbal cues may help to get more in-depth information from respondents, but it is not the only way to extract the same level of infor-

A comparison of traditional and online focus groups

By Matthew Towers

Editor's note: Matthew Towers is the founder of Towers Research Services, San Francisco. He can be reached at mtowers@towersresearch.com or at 415-561-3409. He wishes to thank Jeff Walkowski and David Van Nuys for their help preparing this article.

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mation and it is not without the risk of misinterpretation.

Focus groups are a neutral environment. While qualitative researchers are aware that facilities are an artificial environment, most research is still conducted in a traditional facility setting. The only people for whom this is a natural setting are facility staff, moderators and their clients. Facilities provide a controlled (mostly) environment where research can be conducted with a minimum of influence from extraneous variables. In this controlled environment, a respondent's physical context and at least some of the psychological context, is lost. Online research allows respondents to choose where and when they participate. Many studies have been conducted for technical products where the normal environment for the respondents would have been in an office or at home in front of their computers. While online research venues may or may not be artificial, focus group facili-

ties certainly are.

Face-to-face interviews are the most effective way to stimulate response from a group.

While this may be true in general, it comes at a cost. Observers often hang on every word one respondent says and ignore the rest of the group. At times observers or group members disregard a respondent's contributions because they look different or act strangely. People often pay more attention to outspoken, articulate participants, and ignore the rest without any proof that gregarious people buy more.

It is the moderator's job to manage how observers react to and use information presented during groups. Good moderators can minimize, but not eliminate the effect of the dominant respondents. Good moderators can encourage shy respondents to come out of their shells, but can they make respondents think faster or instantly become more comfortable in groups? Good moderators cannot

remove prejudice; at best they can make observers aware that it exists.

Focus groups rely mostly on top-of-mind thinking.

Sometimes research clients insist on packing the discussion guide with too many questions, leaving moderators with little time to probe in-depth. In such a group, moderators ask participants to respond to a question or other stimulus, and eagerly wait for the response. Many moderators tend to anticipate and reward quick thinking. Do quick thinkers buy more products? Are their perceptions more accurate? This is not an inherent fault of focus groups, but it is a reality that many, if not most, moderators face.

People who are articulate have more valid points to make.

Focus groups rely almost solely on verbal information from respondents. Respondents who are more comfortable writing than speaking are largely left out of the equation or at



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least marginalized. In fairness, it is true that with online groups there might be a bias towards respondents who are more comfortable writing than speaking, though it is often said that Americans' number one fear is speaking in public. The same is not said of the fear of writing in public.

Unspoken advantages of bulletin-board groups

Appearance doesn't matter; content does.

By using an online methodology, neither you nor your client can introduce any of your appearance-based biases into the research process. Ethnicity, attractiveness and accents do not flavor the way moderators manage and interpret groups.

Messages to individual respondents don't interrupt groups.

With bulletin boards, a moderator can privately contact individual respondents without putting them on the spot. Moderators can send praise, ask respondents to tone it down, or eliminate them from a group without interrupting the flow of the group or creating a tense situation.

There is no chance to misread body language.

While BBFGs don't allow moderators and observers to read body language, they also don't allow moderators to misread body language. The focus of bulletin-board groups is on the actual language and content of the responses.

Respondents can take the time they need to respond to questions.

For the more timid or contemplative respondents, BBFGs provide an environment where these more reticent participants can respond in their own time frame. In focus groups, some participants respond quickly, others follow. BBFGs can be set so that responses appear simultaneously; thus speedy respondents don't necessarily lead the discussion. Additionally, because BBFGs take place over a few days, moderators have time to review responses and develop very specific probes.

Respondents can do homework during the group.

Respondents can be asked to do several homework assignments during the group. They can be asked to review other Web sites, look at exhibits and comment on them without being influenced by others. They can read concept statements at their own pace, so they can actually think about them. Additionally, moderators can ask respondents to share

photos of products or of their home and office settings.

Observers can clarify and adjust questions during the group.

Observers can watch the groups online, adjust product descriptions, clarify moderator misconceptions, and add questions with much less disruption than in-person groups.

Moderators need not interrupt the group while they try to manage addi-



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tional questions and clarification from clients in the back room.

Sensitive topics can be handled privately. Sensitive topics can be introduced individually or to a group so respondents can respond in the manner with which they are most comfortable. Some projects require two methodologies because some of the subject matter is sensitive. With an online methodology, moderators can often combine what

would have been two projects: IDIs for sensitive material and groups for non-sensitive issues. With a bulletin-board group, the moderator can send or receive private messages and share responses without attribution to a specific respondent. Additionally, respondents have greater anonymity, and may be willing to talk about sensitive subjects that they might not normally discuss face-to-face in a group.

Participants can go offline to find answers.

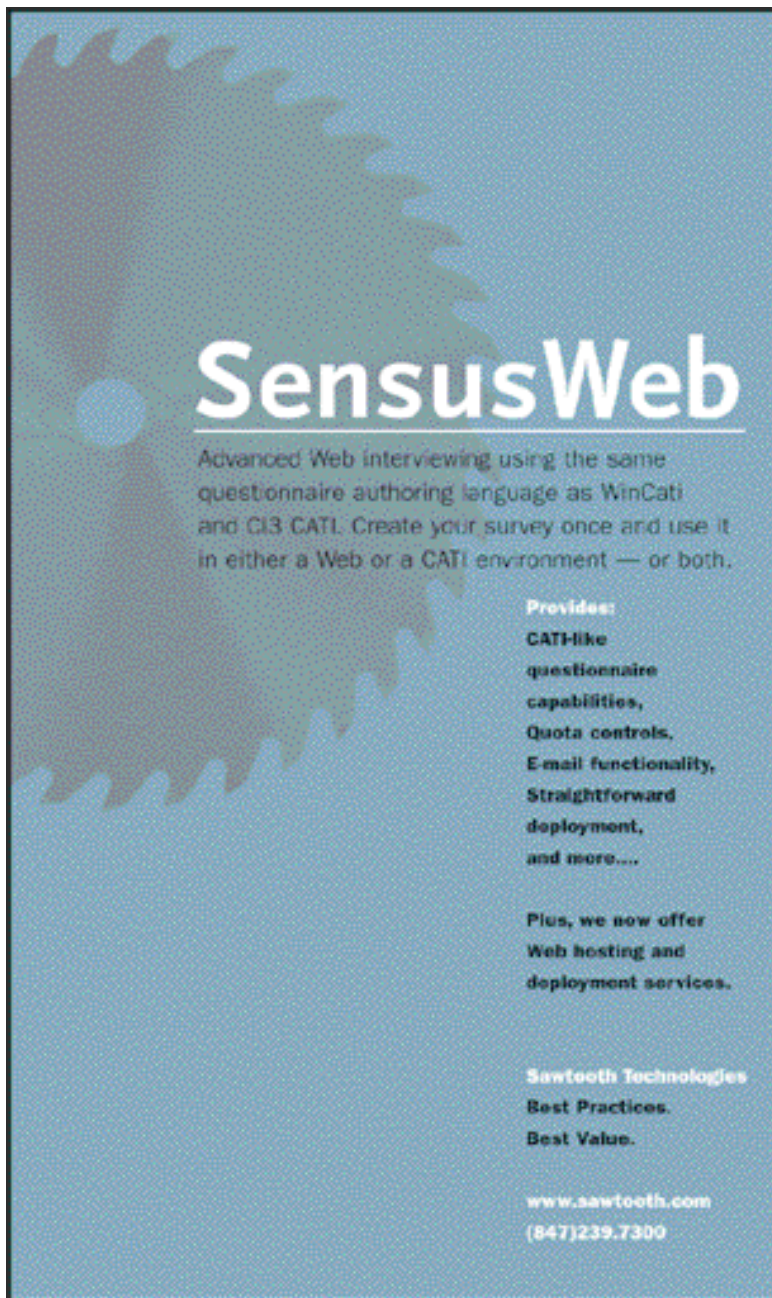
How many times has a moderator asked a question in a group or IDI where the respondent could have answered if they were able to look it up or ask a co-worker? Not all answers are or should be top-of-mind, and what is answerable varies by respondent. For example, consider questions such as: How many servers are on your network? What type of firewall do you use? What is in your closet, garage or medicine cabinet? How is your home office set up?

Of course you can ask these questions in a focus group but the response is based on the participants' memory at that time in that setting. Moderators rely heavily on the respondent's ability to rapidly recall accurate memories. Imagine how much more accurate these responses could be if the respondent was able to look in his/her closet, office or network to get the answer. This is quite easy to do during bulletin-board groups.

Respondents can easily share digital content with the moderator, clients and fellow participants. Most bulletin-board software allows respondents to upload files and links to Web sites. This can be a fast and fun method to explore to learn.

New ways

As mentioned at the beginning, the intention of this article is to challenge the way we look at the difference between online and in-person groups. There are many aspects of in-person groups that are invaluable - such as the personal interaction between the moderator and their clients, the energy of a group, and non-verbal information that in-person groups can provide - but as with any methodology, in-person groups also have limitations. While bulletin-board groups have their own set of challenges, they also offer new ways to overcome some of the limitations of traditional focus groups. | Q



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Rely on your training

The survey research industry has watched over the years as the world has truly become a smaller place. We now have the ability to conduct research around the world, from virtually anywhere in the world. Due to a variety of factors (such as the advances in telecommunications, Internet penetration and governmental leadership changes) a research professional can conduct research across the globe. Why should the research industry be concerned about this flourishing capability? For our growth and survival. But this is not a doom-and-gloom article. In fact, with strict adherence to accepted research practices and dogged application of basic research methods and principles, all savvy researchers can conduct international research.

In the latest edition of his *Marketing Research* textbook, author Naresh Malhotra states, "The United States accounts for only 39 percent of the marketing research expenditures worldwide. About 40 percent of all marketing research is conducted in Western Europe and 9 percent in Japan. Most of the European research is done in Germany, the United Kingdom, France, Italy and Spain. With the globalization of markets, marketing research has assumed a truly international character and this trend is likely to continue." If the industry wants to continue to grow all involved in research must develop their international research abilities or be left behind. What is the secret to successful international research projects? The answer is simple: skillful coordination by the research professionals working on project.

There's no need to fear international research projects

Various factors should be considered as one undertakes either a domestic multi-language project and/or a true multi-country project. However, rather than offer up another checklist or how-to formula, let's take a different approach. What follows are some descriptions of illuminating experiences from a variety of research projects.

- Years ago, many U.S. based research firms learned that vacations are a very serious event in many parts of Europe. In fact, during the month of August, whole countries can seemingly go on vacation en masse. This is something that can certainly change the dynamics of a project, whether it pertains to sampling bias, the time in field, the deadline or how to interpret the final data collected. In fact, many of us have learned to consult with our clients regarding when to field and when not to field projects in these regions. The general recommendation is to avoid conducting survey research during this time period.

- In some cases, honorariums can be an issue. Specifically, in Thailand, it



By Ed Ledek

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became rather clear that offering an honorarium was not an acceptable research practice. While this approach works in many parts of world, it is unprofessional and offensive and hence not acceptable with businesspeople in this universe. So, the incentive was dropped and the study was completed without further issue.

- A prepared, professional researcher will know the universe they wish to represent with the data. For example: don't use head-to-head ratings of one company or product versus another in certain Asian countries; don't attempt to reach males in Guam until after eight in the evening (local time); for Web surveys in China, extra care should be taken regarding how to use simplified versus traditional writing when presenting the survey to the respondents, etc. The list is endless!

- In a January 2000 *Quirk's* article, James Velayas opined, "I believe that any responsible researcher, manager or client who fails to become personally involved in the research process puts both his firm and his career at great risk... Each phase of the research process... requires the involvement and active presence of the responsible party." (To read the full article, visit www.quirks.com and enter QuickLink 554.)

In the last several years I've had the opportunity to manage and direct research projects across the globe. It is a very rewarding yet taxing experience - much like the process here at home. That is, no matter where we fit in the research process, we must approach it properly, soundly and with the passion referred to by Velayas. This type of approach has afforded me several wonderful learning experiences.

In the mid-1990s I was in St. Petersburg, Russia and learned quite quickly the briefing of a project is as vital to a group of interviewees and supervisors as it is to such a group in New York, Chicago or Salt Lake City. During the briefing, the group started to get a little noisy and as I was about to say something, a grandmotherly lady raised her voice and told the group to quiet down and pay attention. The room fell silent. The translator told me what had been said. To that, I looked at the group then to the woman and

enthusiastically said, "Da. Da. What she said!" We all chuckled and then got back to business.

Several years later, in Malaysia, I learned how to work with people of differing socioeconomic and religious status. While conducting the training Kuala Lumpur, I had people of two distinct ethnic groups (and, as it turned out, differing political leanings) start to get very passionate in expressing their feelings. I had been briefed this might happen and was told it was best to steer away from the issues and topics that stirred these opinions. As the discussion developed, we were actually able to have a substantive exchange regarding the sensitive topics and the participants went away rather surprised by our ability to have this discussion professionally and peacefully. Through this experience I learned that it is possible to gently guide interviewees and moderators to broach sensitive subjects in a constructive manner.

At another point, in Cambodia, I garnered a couple of important lessons. The first occurred before we started fielding the project. It began with the translation. The firm we were working with in the U.S. had already commissioned the survey to be translated from English to Khmer (the main Cambodian language). As we prepared, I politely insisted we have an exhaustive reverse translation session. That eventually involved the original translation partner, two local Cambodians, who worked for the client, and myself. Essentially, I had my trusted colleague from the client company read to me what each question said from Khmer to English (of course, he did not have the English version in front of him). We then debated and worked on or approved each and every question. This took a day and a half, but when it was completed I felt the U.S. client would be confident that the survey that went to field was as accurately translated as possible and "matched" the English version either in word or intent, depending upon the Khmer language. This taught me that any survey translated from English to another language should be checked via a reverse translation process, to ensure the instrument conveys the questions

according to client desires.

- Around the world, there are many people in the research profession who risk serious consequences to themselves and their families as they perform their work as a professional researcher. In some countries, respondents are risk-takers as well. In Cambodia I witnessed a man, whom we recontacted to conduct a validation, admit he feared for his physical well being after speaking with our people the previous day.

Many governments do not want the research profession to take hold and progress in their respective countries because survey research (both public opinion polling and marketing research) when carried out correctly can be a powerful tool for change. In fact, in the *International Journal of Public Opinion*, Tom Smith wrote recently, "...despite these noble principles, survey research, the main scientific method to collect, analyze, and distribute information about demographics, behaviors, and opinions, is banned or restricted in much of the world."

After all, knowledge is power! Why do respondents around the world share their opinions? Why do we want to obtain their views? This data provides valuable insights and guidance not only to companies but also to governments and NGOs as they plan and make decisions. We are gathering the words of the people.

Basic principles

Though they can seem daunting, we should not have a fearful attitude toward international or multi-language projects. Rather, we should approach them precisely how we approach well-run, fundamentally sound domestic or single-language research projects. If we are performing our tasks properly then our international projects will also be designed using the basic principles we all know (or should know). Combined with the "six steps of the marketing research process" as defined by Malhotra, we will succeed. These lessons and insights will, in many ways, sound similar to those we learned when we ran our first projects right here in the U.S. If you adhere to them, you should have no trouble tackling an international research project. | Q

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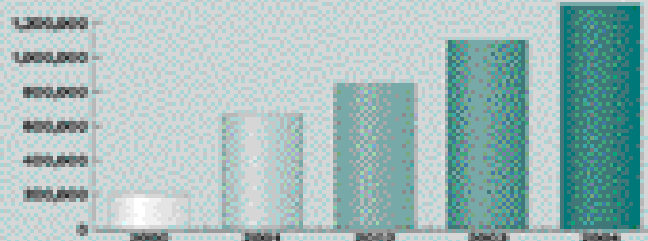
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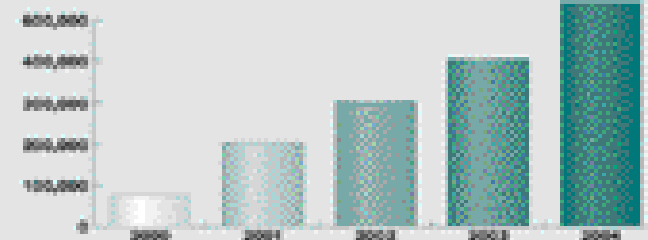


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Demographics and online survey response rates

Response rates are vitally important to survey-based research studies because the level of error and the studies' findings are ultimately linked to the response rates. The Council of American Survey Research Organization's (CASRO) definition of a research survey response rate is "the ratio of the number of interviews to the number of eligible units in the sample" (CASRO 1982). It is important to calculate response rates accurately because they are one measure of the potential bias in the research data, with a high response rate indicating a lower potential bias. Alternatively, when low response rates occur, a non-response bias may exist, where by there is a systematic difference between those who do and do not respond to a survey measurement instrument. If and when non-response bias is present (e.g., non-respondents differ significantly from respondents) then results can be false or misleading, and results cannot be generalized to the entire population being studied.

Response rate improvement methods

Since low response rates can produce unreliable research results, a fair amount of research literature exists examining response rates over time. Generally, response rates have been found to be declining, not only in traditional research modes such as direct mail and telephone research (Bickart and Schmittlein, 1999), but more recently in online research as well (Sheehan 2001). Because lower response rates can lead to non-response bias, achieving higher response rates is an imperative for the researcher.

A number of research studies have examined response rates

across multiple research modes (e.g., direct mail, telephone, Web), and there is a significant amount of research in the marketing and social science literature regarding methods to increase response rates (Dillman, 1978). The two methods shown to be the most effective are: 1) providing currency incentives, and 2) attempting follow-up/reminder contact. It has been repeatedly shown that providing financial incentives as a persuasive motivator for reluctant respondents is a viable and effective technique for increasing response rates. For example, Goetz, Tyler and Cook (1984) concluded that financial incentives increased response rates and showed no differences in the demographics of the incentive and non-incentive groups. Shettle and Mooney (1999) reached a similar conclusion,

A study of non-response patterns

By Kurt Knapton and Steve Myers

Editor's note: Kurt Knapton and Steve Myers are both officers of e-Rewards, Inc., a Dallas-based online sample provider. They can be reached respectively at kknapton@e-rewards.com and smyers@e-rewards.com.

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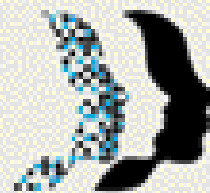
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while Mason, Lesser and Dillman (2003) found that non-response error may actually be reduced when financial incentives are used in student population studies.

Additionally, in a meta-analysis of 38 studies reported in the 1970s and 1980s, Church (1993) concluded that a small financial incentive increased response rates by 19 percent. McDaniel and Rao (1980) compared the accuracy of incen-

tivized respondents vs. non-incentivized respondents and found that the incentivized group provided more accurate information and was more diligent when completing their questionnaires. Independent of financial incentives, it has been consistently shown that sending reminder notifications following the initial survey is also an effective way of increasing survey response rates. For example, Dillman (1978)

reports that reminder notifications increase response rates among mailed surveys. King (2002) investigated response rates and data collection strategies for Web-based employee surveys and determined that reminder notifications resulted in an increase in company response rates, regardless of industry type or company size. In the same study, King estimates that online response rates will be 8-15 percent lower when organizations do not send a follow-up reminder. Finally, Kanuk and Berenson (1975) examined over 75 articles that addressed increasing mail survey response rates and found that follow-up contact and the use of currency incentives were the only two methodological procedures that had any empirical impact on response rates. This data suggests that proven methods to increase response rates exist and may be used by researchers as an effective way to diminish potential non-response bias.

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Online research and non-responders

The inherent advantages of online research coupled with the lower response rates being garnered via traditional research modes such as mail and telephone has led to an overall industry endorsement of Web-based surveys. As online market research becomes a larger portion of the research mix, the question arises whether patterns of non-response observed historically in traditional research modes are also present in online market research. Furthermore, would such patterns of non-response tend to occur in the same demographic groups that have been found to be generally under-represented on the Internet as a whole?

Since the authors were unable to locate any research literature devoted to answering the above questions, the authors prepared this study to provide researchers with information that can be used to appropriately account for, and man-

Figure 1: Profile Of Online Population
(February-March 2002)

BASE: All Adults	Adults Online	All Adults	Percentage Point Difference
	%	%	%
AGE			
18 - 29	28	22	+6
30 - 39	23	22	+1
40 - 49	23	20	+3
50 - 64	24	18	+6
65 +	5	16	-11
SEX			
Men	49	48	+1
Women	51	52	-1
EDUCATION			
High school or less	37	52	-15
Some college	31	26	+5
College graduate (or post graduate)	32	22	+10
HOUSEHOLD INCOME			
\$25,000 or less	18	25	-7
\$25,001 - \$50,000	25	29	-4
\$50,001 and over	46	32	+14

Source: The Harris Poll #18, April 17, 2002. Harris Interactive survey conducted by telephone with a sample of 2,038 adults in February and March of 2002.

age, patterns of online survey non-response if and when they exist.

Two separate hypotheses will be tested:

H1: Patterns of non-response

within an online panel will tend to exist in the same demographic categories that have experienced patterns of non-response in traditional research modes, such as mail and

telephone.

H2: Patterns of non-response within an online panel will tend to exist in the same demographic groups that are known to be under-represented on the Internet vs. the general U.S. population.

Non-response patterns in traditional research modes

Several key findings have been observed in studies investigating patterns of non-response among phone and mail survey respondents of differing demographic characteristics. Dillman noted in 1978 (corroborating Suchman and McCandless, 1940) that non-respondents generally tend to have less education and are older. A number of recent studies have also shown that gender has an effect on response propensity. Specifically, it has been found that females are more likely to respond to a mail questionnaire than males (Collins et al, 2000). One study reports that only 31 percent of males responded

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Figure 2: Internet Use From Any Location, October 1997, December 1998, August 2000, and September 2001 (Selected Statistics with Analysis)

A Nation Online "How Americans Are Expanding Their Use of the Internet" Washington D.C. February 2002	Internet Use (percent)				Deviation from Mean
	Oct. 1997	Dec. 1998	Aug. 2000	Sept. 2001	
Total Population	22.2%	32.7%	44.4%	53.8%	-
Gender					
Male	24.3%	34.2%	44.6%	53.9%	0.0%
Female	20.2%	31.4%	44.2%	53.6%	-0.1%
Race/ Origin					
White	25.3%	37.6%	50.3%	59.9%	6.0%
Black	13.2%	19.8%	29.3%	39.8%	-14.1%
Asian Amer. & Pac. Isl	26.4%	35.8%	49.4%	60.4%	6.5%
Hispanic	11.0%	16.6%	23.7%	31.6%	-22.3%
Family Income					
Less than \$15,000	9.2%	13.7%	18.9%	25.6%	-28.9%
\$15,000 - \$24,999	11.6%	18.4%	25.5%	33.4%	-28.5%
\$25,000 - \$34,999	17.1%	25.3%	36.7%	44.1%	-9.8%
\$35,000 - \$49,999	22.9%	34.7%	46.5%	57.1%	3.2%
\$50,000 - \$74,999	32.3%	45.5%	57.7%	67.3%	13.4%
\$75,000 & above	44.5%	58.9%	70.1%	78.5%	25.0%
Educational Attainment					
Less Than High School	1.8%	4.2%	8.8%	12.8%	-41.1%
High School Diploma/GED	9.7%	19.2%	30.6%	39.8%	-14.1%
Some College	24.8%	38.6%	54.2%	62.4%	8.5%
Bachelors Degree	41.4%	58.4%	72.5%	88.8%	26.9%
Beyond Bachelors Degree	51.9%	66.4%	78.5%	87.7%	29.8%
Age Group					
Age 18 - 24	31.6%	44.3%	56.8%	65.8%	11.1%
Age 25 - 49	27.1%	40.9%	55.4%	63.9%	10.0%
Age 50 +	11.2%	19.3%	29.6%	37.1%	-16.8%
Geographic Location of Household in Which the Individual Lives					
Rural	nm	29.3%	42.5%	52.9%	-1.0%
Urban	nm	33.9%	45.0%	54.2%	0.3%
Household Type in Which the Individual Lives					
Married Couple w/Children <18 Years Old	26.7%	37.6%	50.5%	62.0%	8.1%
Male Householder w/Children <18 Years Old	18.2%	25.4%	34.5%	45.6%	-8.1%
Female Householder w/Children <18 Years Old	14.8%	22.3%	32.9%	45.2%	-8.6%
Family Household without Children <18 Years Old	19.6%	30.0%	41.4%	50.5%	-3.4%
Non-Family Household	21.1%	32.9%	42.7%	47.6%	-6.3%

Source: U.S. Bureau of the Census, Current Population Survey supplements, October 1997, December 1998, August 2000, September 2001. Notes: a Age 25 and older. b Age 18 and Older. c Both people who are unemployed and people not in the labor force.

to a mail questionnaire as compared to 49 percent of females (McCabe et al, 2002). Other studies, such as Wardle, Robb and Johnson (2002) have found that affluence is a factor; the more affluent the respondent's household, the greater the percentage of survey questions answered. To summarize these

observations among traditional research modes, non-responders were found more likely to be: less educated; older; less affluent; male.

The online population vs. the general population

A substantial amount of research literature exists that is devoted to

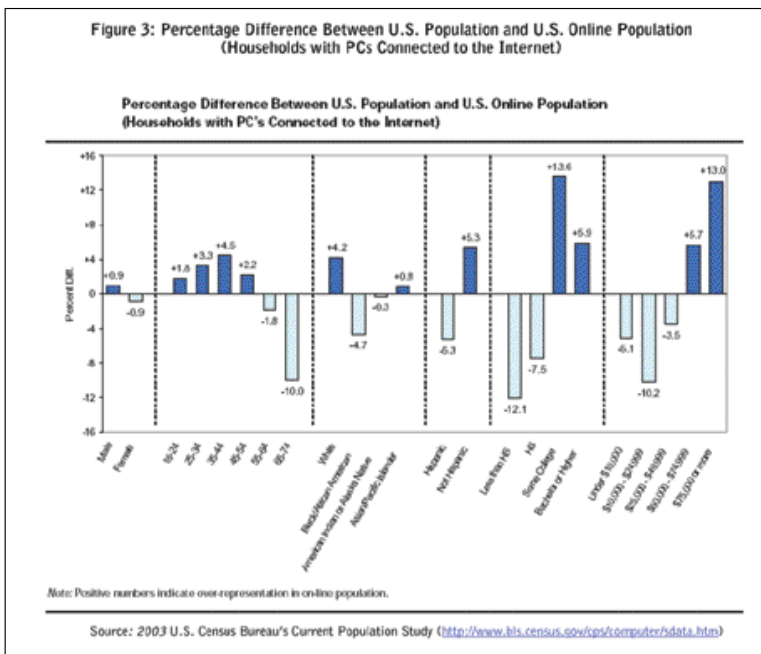
how the U.S. Internet population compares with (and differs from) the overall U.S. general population. Five separate studies are cited below

In 1996, two different studies found that younger, better-educated, and wealthier males were over-represented in the Internet-based population (Bonchek et al, 1996; Kehoe and Pitkow, 1996). It is important to note, however, that the Internet population has normalized substantially since 1996, with some vestiges of over-representation fading in subsequent, more recent studies.

A nationwide Harris Interactive survey conducted by telephone with a sample of 2,038 adults in February and March of 2002 showed that the profile of the U.S. online adult population can differ from the overall general adult population in the following ways (Figure 1): the online population is biased toward the more affluent; the online population is biased toward the better-educated; the online population profile is looking more like a cross-section of all adults, up to, but not including, those over 65, who comprise 16 percent of all adults but only 5 percent of those online.

A fourth study was based on the U.S. Census Bureau's Current Population Survey conducted in 2001 which included approximately 57,000 households and more than 137,000 individuals across the United States (Figure 2). The study findings were presented by the National Telecommunications and Information Administration (NTIA) and the Economics and Statistics Administration in a paper titled, "A Nation Online: How Americans Are Expanding Their Use of the Internet" (Washington, D.C., February 2002):

- The online population is under-represented in the 50+ age group.
- The online population is under-represented in the black and Hispanic ethnic groups.



- The online population is under-represented in the “less than high school” and “high school diploma/GED only” educational groups, while over-represented in the “bachelors degree and beyond” educational groups.

- The online population is under-represented in households earning less than \$25,000 of income annually, while over-represented in households earning over \$50,000 of income annually.

- Since August 2000, males and females have had virtually identical rates of Internet use, while in September 2001, the Internet use rate was 53.9 percent for males and 53.8 percent for females.

- There was no significant under-representation found in rural vs. urban dwellers.

- There were only slight differences in representation regarding household types such as the number of children in the household.

The fifth study cited comes from the 2003 U.S. Census Bureau's Current Population Study (www.bls.census.gov/cps/computer/sdata.htm). The following items and graphic in Figure 3 summarize its conclusions related to demographic differences that exist

between the online and offline populations:

- The online population is the most under-represented in the 65+ age groups.

- The online population is under-represented in the black/African-American and Hispanic ethnic groups.

- The online population is under-represented in the “less than high school” and “high school only” educational groups, while over-rep-

resented in the “some college” and the “bachelors degree or higher” educational groups.

- The online population is the most under-represented in households earning less than \$25,000 of income annually, while over-represented in households earning over \$50,000 of income annually.

Methodology

Our firm, e-Rewards, Inc., a Dallas-based online sample provider that provides a currency-based incentive to survey respondents sourced from its panel of approximately 1.3 million members, analyzed survey response rate data from over six million survey invitations that were e-mailed to its panel members during 2004. To account for any seasonality, the months of January, April, August, and October were arbitrarily selected for survey response rate analysis across eight separate consumer demographic dimensions (e.g., gender, age, annual household income, education level, ethnicity, marital status, urban/rural residence, number of children in household) and two business/occupational demographic dimensions (e.g., occupation and business title). Survey response rates were defined as the percentage of

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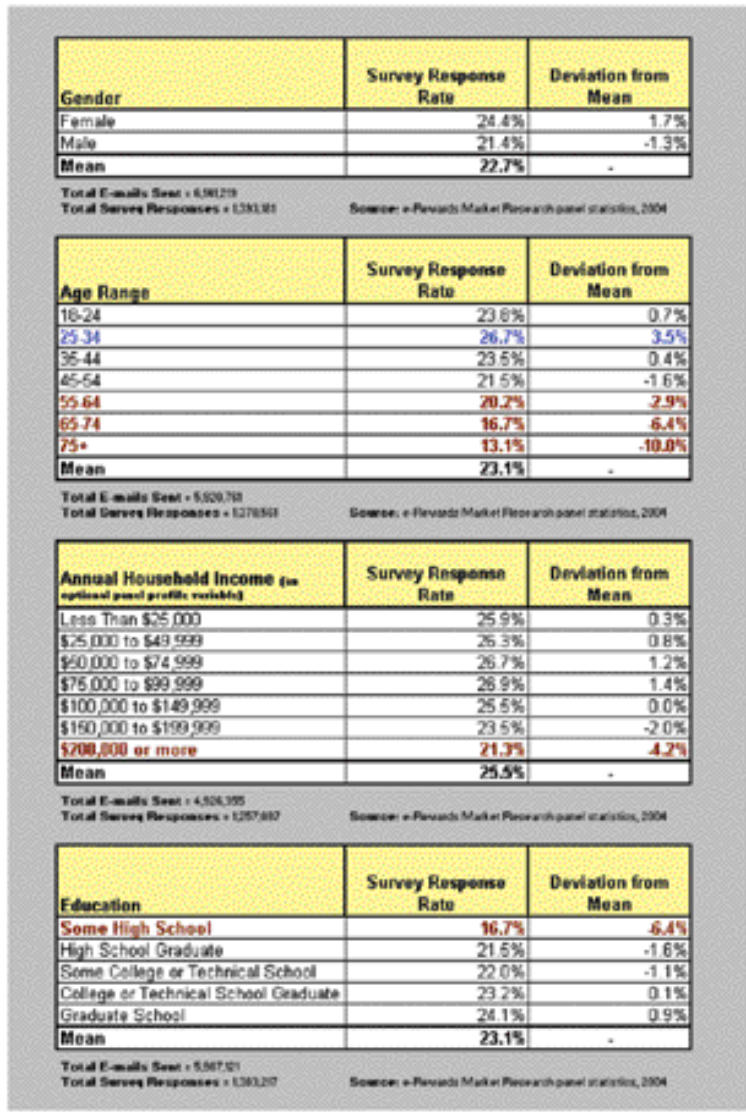
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Figure 4: Survey Response Rates by Selected Demographic Profile Variables
January, April, August, and October 2004

(e-Rewards Market Research Panel - Combined Statistics with Analysis)



outbound e-mail survey invitations sent to active panelists (e.g., equally eligible panelists with deliverable e-mail addresses) that resulted in fully completed online research survey interviews (e.g., surveys where respondents completed all non-optional survey questions presented to them). Survey instrument lengths varied, but the average survey length was approximately 10 minutes. Since this type of analysis requires unrestricted access to internal panel response rate data,

the authors used the e-Rewards online panel for this test. Other online panels may experience significantly different absolute response rates, but the authors believe that the directional data should be consistent with our findings. The survey response rates observed in the overall demographic groups studied ranged from 22.7-31.3 percent.

Analysis and findings

The key findings are summarized

below (and in Figures 4, 5 and 6):

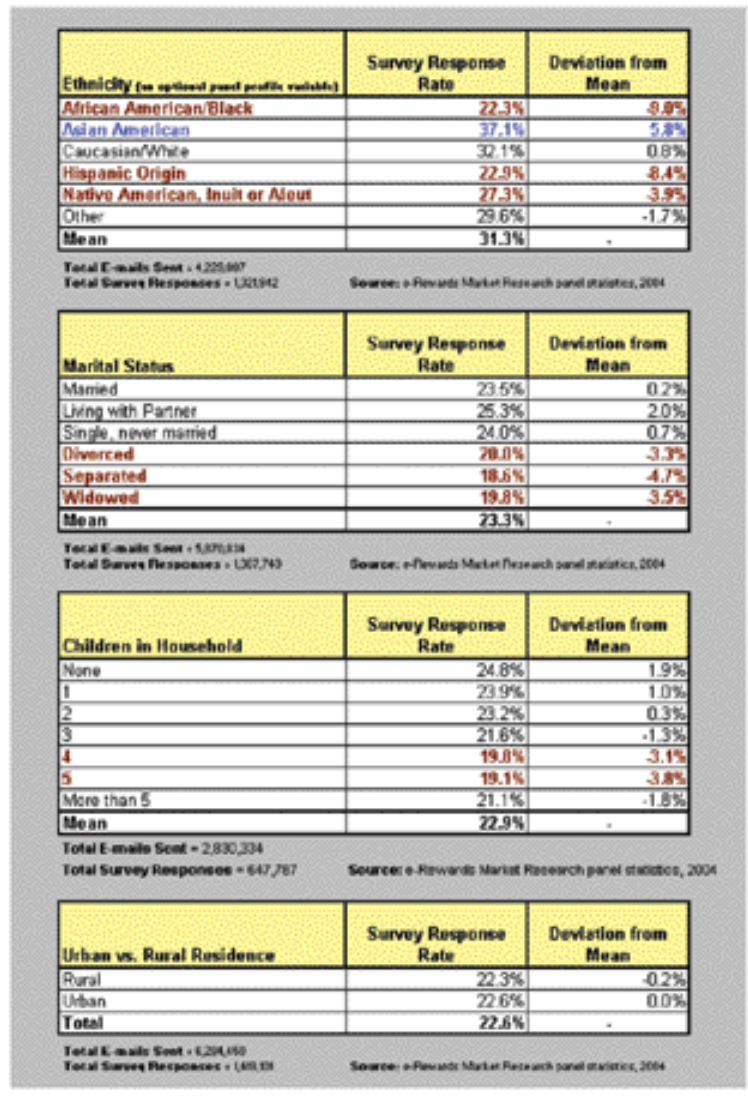
- Males respond at a lower rate than females (although not significantly).
- Those who have not obtained a high school diploma respond at a lower rate than those who have.
- The response rates increase with the level of education that a respondent has achieved.
- Those who report \$200K+ in annual household income respond at a lower rate than those of other income brackets.
- Those aged 65+ responded at the lowest rates compared to other age groups.
- African-Americans, Hispanics and Native Americans respond at a lower rate than other ethnic groups, while Asian-Americans respond at a significantly higher rate versus the mean.
- Those who are currently divorced, separated or widowed respond at a lower rate than other marital status groups.
- Those with four or five children in the household respond at a lower rate than other groups.
- There were no significant response rate differences among rural vs. urban dwellers.
- Executives/upper management and sales professionals respond at the lowest rates versus other occupational groups, while homemakers and teachers respond at the highest rates versus other occupational groups.

• The workers with the most seniority (e.g., chairman/board member, president/CEO/COO, executive vice president/senior vice president, vice president) responded at the lowest rates, while developer/programmers, CPAs, and doctors responded at the highest rates. (Note: the unique presence of higher than average financial incentives/honorariums for doctors may be responsible for the higher than average doctor response rates.)

Conclusions and discussion

- The data provides support for H1.

Figure 5: Survey Response Rates by Selected Demographic Profile Variables
January, April, August, and October 2004
(e-Rewards Market Research Panel - Combined Statistics with Analysis)



H1: Patterns of non-response within an online panel will tend to exist in the same demographic categories that have experienced patterns of non-response in traditional research modes, such as mail and telephone.

Similar to observations among traditional research modes (e.g., direct mail and telephone), non-responders were also found in the online research mode to more likely be: less educated; older; less affluent; male (but to a much lesser

degree).

- The data provides support for H2.

H2: Non-response rate biases within an online panel will tend to exist in the same demographic categories that are known to be under-represented on the Internet vs. the general U.S. population.

Similar to observations among demographic categories that are known to be under-represented on the Internet vs. the general U.S. population, non-responders were

also found in the online research mode to more likely be: less educated (in the some high school category, but not in the high school graduate category); older (especially in 65+ age categories); less affluent (although significant response rate drop-off was detected only at the \$200K+ annual HHI level); African-Americans, Hispanics, and Native Americans (while Asian-Americans were found to respond at a rate higher than average).

More studies are clearly needed from other online panels to compare with the results of this study since there may be factors particular to the e-Rewards panel, its recruitment methodology, and its use of incentives. In addition, comparison data from outside sources was only available for consumer demographics across research modes, and more B2B research is needed for valid comparisons to take place in the future. However, the magnitude of the response rate data that was observed (over six million survey invites) provides the authors with a high degree of confidence in the directional validity of the findings.

In summary, researchers need a clearer understanding of the tendency of different demographic groups to under-respond to online survey instruments, so that any resultant patterns of non-response can be appropriately identified and managed during the course of a project. Appropriate ways for researchers to respond to lower than desired response rates by certain demographic groups include: 1) sending additional survey invitations and/or reminders, 2) increasing financial incentives, 3) adjusting or weighting data to account for groups with lower response rates, and/or 4) testing for non-response bias using an alternate research mode. The areas where under-response was observed appeared to be consistent with respondent behavior seen in traditional modes of research and that which is currently understood about the U.S.

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Text Support	Rank	Time
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Respondent Introduction	3	0:46
The respondents are talking specifically about the product.	3	0:46
Moderator introduces first specific product concept.	3	0:46
Respondent reaction to first concept.	3	0:46
Moderator introduces second specific product concept.	3	0:46
Respondent reaction to second concept.	3	0:46
Respondents talk about specific product experiences.	3	0:46



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Figure 6: Survey Response Rates by Selected Demographic Profile Variables
January, April, August, and October 2004

(e-Rewards Market Research Panel - Combined Statistics with Analysis)

Occupation	Survey Response Rate	Deviation from Mean
Artistic/Literary	25.7%	2.7%
Business Owner/Self-Employed	21.6%	-1.4%
Clerical/Administrative	26.4%	3.4%
Crafts/Construction Trade/Foreman	21.8%	-1.3%
Doctor/Physician	27.9%	4.8%
Executive/Upper Management	17.9%	-5.2%
Farming/Forestry/Fishing	23.0%	-0.1%
Homemaker	39.3%	7.3%
Mid-Level Management	23.2%	0.2%
Military/Civilian Uniform Services	29.2%	2.8%
Professional/Technical	24.3%	1.3%
Retired	24.5%	1.5%
Sales	18.8%	-4.3%
Student	24.8%	1.8%
Teacher	39.2%	7.2%
Unemployed	27.8%	4.8%
Other	25.0%	2.0%
Mean	23.0%	-

Total E-mails Sent = 5,705,870
Total Survey Responses = 1,201,290

Source: e-Rewards Market Research panel statistics, 2004

Business Title (a non-paid position)	Survey Response Rate	Deviation from Mean
Account Manager / Account Director	21.5%	-4.2%
Administrator	29.0%	3.3%
Assistant Director / Assistant Manager	25.4%	-0.5%
Associate / Senior Associate	27.2%	1.5%
CFO / Controller / Treasurer	25.9%	0.2%
CEO / CTO	27.3%	1.6%
Certified Public Accountant	34.0%	8.3%
Chairman / Board Member	17.3%	-8.4%
Developer / Programmer	34.1%	8.4%
Director / Department Head	22.5%	-3.2%
Doctor/Physician	34.8%	8.3%
EVP / SVP	18.0%	-7.7%
General Manager	24.1%	-1.6%
Manager / Senior Manager	23.6%	-2.1%
Partner / Owner	25.2%	-0.5%
President / CEO / COO	28.9%	4.8%
Product Manager	24.9%	-0.6%
Professional / Professional Specialist	28.2%	2.5%
Publisher / Producer	28.5%	2.8%
Supervisor	26.1%	0.4%
Technician / Technical Specialist	26.7%	1.1%
Tradesman / Trade Specialist	25.6%	-0.1%
VP / Assistant VP / Principal	29.9%	4.8%
Other	25.6%	3.3%
Mean	25.7%	-

Total E-mails Sent = 4,470,870
Total Survey Responses = 1,128,727

Source: e-Rewards Market Research panel statistics, 2004

online population. We hope that the current study's findings are an aid to researchers and help generate more interest and research on this topic. | Q

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Avoid the *Field of Dreams* fallacy

“If you build it, they will come,” is a famous line from the 1989 movie *Field of Dreams* that describes how many people feel about online surveys. Unfortunately this “*Field of Dreams* fallacy” dooms many online survey efforts to poor response rates, bad data and recriminations over what went wrong.

There’s no question that online surveys are popular because of their ease of use and the speed with which they can be used to gather data. Unfortunately many find that putting a survey online doesn’t automatically translate into higher response rates or better data. The cautionary message here is that the ease by which online surveys can be constructed should not mislead you into thinking that creating and conducting a good survey is therefore easy. The good news is that you can avoid these problems by taking a few important steps at the beginning of your online survey effort.

“Begin with the end in mind,” is one of the central messages of Stephen Covey’s *The 7 Habits of Highly Effective People*. It applies equally to the creation and execution of successful surveys. Good surveys begin with a goal: to obtain an answer to an important question through the accumulation of sound data. That question (notice I did not say that constellation of questions) focuses the survey, ensures that the survey questions are relevant, and provides a story line around which the data can be gathered. Remember:

Good surveys seek to clarify through the accumulation of data, not to simply accumulate data and hope that something interesting jumps out from it.

Rule #1: begin with the end in mind. Focused surveys have an additional benefit: they are generally short – meaning that they can be completed easily and quickly – and

don’t leave the survey taker wondering, “What in the world are they trying to figure out?” By making it easy for respondents to take the survey, you increase response rates and obtain more accurate data. When creating surveys it is always important to bear in mind not only “What am I trying to determine?” but also, “How easy or difficult am I making it for the person I want to take this survey?” A common source of poor survey response rates is a failure to consider the latter question when engaged in the process of sur-

Putting your survey online won’t bring automatic success

By Lawrence Kilbourne

Editor’s note: Lawrence Kilbourne is director of professional services at WebSurveyor Corporation, a Herndon, Va., research firm. He can be reached at lkilbourne@websurveyor.com.



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vey creation.

Rule #2: make it easy to take.

In many aspects, the *Field of Dreams* fallacy really boils down to a failure to keep in mind those who will be taking your survey. It's a bit like narcissism - call it survey narcissism. If I focus solely on what I hope to obtain by way of data, I completely lose sight of the fact that unless the survey appeals to potential respondents, I may end up with no responses and no data.

Rule #3: make your survey appealing.

There are a number of components that go into accomplishing this. First, unlike the movie *Field of Dreams*, people will not come simply because you have created a survey. They must be invited to take it, and the form and content of the invitation are critical to the success or failure of your effort. For our

purposes we are going to assume that the invitation will come via e-mail. The simplicity, speed and ubiquity of e-mail set it off decisively from other media that could be used to issue the invitation (e.g., direct mail). The initial question to be taken up is what form will the e-mail take: text or HTML? There are pros and cons to each, so let's briefly survey them.

HTML e-mails have a natural advantage over text e-mails because they are graphical. Well-done graphics appeal to the eye. In our information-saturated world, few of us will take the time to read a 1,000-word - or even a 100-word - invitation. The ubiquity of e-mail cuts both ways, and a common reaction to the growing stack of e-mails we find in our inboxes is to quickly delete those that don't convey a compelling message easily grasped.

Graphic HTML e-mails overcome this by actually showing the message and how to respond. Putting big radio buttons within the e-mail invitation saying "Click here to take the survey" makes it easy for the recipient to respond (remember Rule #2?).

To be sure, HTML e-mails have their drawbacks as well. The most obvious is that many e-mail programs block graphics, so there is a certain percentage of the universe that will not receive your survey invitation. Beyond that hurdle is a second: the growing adoption of spam filters that react to warning signs, like e-mails with attachments or with graphics embedded in them. The impact of spam filters can be mitigated to a large degree by the judicious use of language within the HTML e-mail (e.g., avoiding red-flag phrases like "Win a free..." as well as the use of symbols like !!! or \$\$\$). There are even spam testers available that provide a scoring of how likely your e-mail is to be rejected by the most common spam filters.

The primary advantage of text e-mails is that they are unlikely to trigger spam filters (assuming you don't use the red-flag phrases and symbols noted above). That said, however, there's little else that makes them appealing. Because they are composed of text, they must be comprehended in a linear fashion: reading line to line. This is inherently a longer process than comprehending something visually. The risk is that before the reader has fully read your message, he or she may simply decide to move on. As a general rule, text survey invitations are best reserved for internal audiences where a higher response rate is assumed.

Rule #3a: Make your e-mail invitation appealing.

No matter how appealing your e-mail invitation, unless a recipient actually opens it your cause is lost. Under the onslaught of solicited and unsolicited e-mails, many

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today have adopted a survival strategy of quickly scanning the subject lines in their in-box and simply deleting those e-mails that are suspicious looking or unappealing.

Rule #3b: Make the subject line to your e-mail appealing.

This is more art than science, but some basic rules exist that can reliably guide us. First, begin with the end in mind (remember Rule #1?). The whole purpose of the subject line is to entice someone to go one step further and open the e-mail. So the subject line must be compelling - literally as well as figuratively. "Please take my survey" is not likely to garner many responses. "Survey invitation: We'd like your opinion on..." is going in a better direction. The best way to gauge a subject line's appeal is to try it out yourself, on friends or business associates in an actual e-mail. Ask them how it appears in their e-mail window (does it show up in its entirety, or only in part?), and whether they would open it to read more.

Second, keep it accurate. Do not equate deceptive subject lines with compelling ones. You first risk the wrath of the recipient once they open the e-mail and discover that its message does not match what was promised in the subject line. But more importantly, you run afoul of the federal CAN-SPAM Act, which provides for criminal as well as civil penalties for e-mailers who use deceptive or false subject lines in their e-mails. It's not only a best ethical practice to be honest and straightforward in your subject line, it's the law!

To this point we've succeeded in creating a survey that is user-friendly, as well as an invitation that is appealing and a subject line that is compelling. Our ballpark looks built, to continue the analogy we began with, will they come now?

Even with all that has been done it is likely that response rates will still be poor. The lesson here is that

for a survey invitation to be successful, in addition to everything above, there must be something in it for the survey respondent. Call it a quid pro quo, if you want to be fancy, or just a fair deal. Either way, there must be some incentive for an individual to complete your survey. You are asking people to take time out of their busy day to provide you with information you deem important or perhaps critical. What are you prepared to offer in response for their time and effort?

Survey incentives can take many forms, and there isn't time or space here to go into them in detail. But some basic guidelines can be laid out. First, incentives don't necessarily have to cost a great deal. Use your creativity: can you offer a service or a discount on a purchase in lieu of cash? Second, even if you opt for a cash incentive it doesn't have to cost you an arm and a leg. Third, incent the first x number of people who respond. Telling people in your e-mail invitation that the first 100 or 200 respondents will receive a small incentive drives up response rates and gets people to take the survey immediately rather than think about taking it later. Finally, use your graphics in the e-mail invitation to show the incentive, as well as talking about it in the text.

Once people understand that you are willing to fairly compensate them in exchange for their time and assistance, then you can finally answer the question "Will they come?" in the affirmative. Hence our final rule: Give people a reason to take your survey.

Make it easy

Online survey tools have made it easy to construct surveys and collect data. By following the four rules outlined here, you can make it easy to get the data you're looking for - and be assured that if you build it, they will come. | Q

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Quirk's Marketing Research Review | 73

Beyond mere measurement

Most retailers agree that customer retention is the key to improving share of market. Most also agree that quality customer service is the key to customer retention. But opinions differ on how to measure and improve customer service. Survey methodologies offer a number of ways: intercepts, telephone surveys, in-store comment cards and interactive voice response (IVR). Of necessity, these surveys are often brief and can therefore capture only a few key measurements of service. In addition, respondents who take part in these surveys can be either very disgruntled or wildly satisfied. But most customers fall into the wide gap between those extremes.

Mystery shopping fills that gap. However, companies that use mystery shopping only as a measurement are only using half the tool. To maximize the value of mystery shopping, retailers should use results to devise and implement strategies that improve their level of customer service.

Two nationwide clients of our firm, Customer Perspectives, exemplify the diverse ways in which mystery shopping can be used to improve and enhance, rather than just measure, customer service.

Case study: a bridal store

The bridal customer is unique. She is shopping for apparel for a very important day - either her own wedding or that of a close friend or relative. Weddings are brimming with emotion and stress, much of it focused on appearance and detail. The planning process can take months, even years. Bridal store employees are trained to take all this into account and provide service that makes their customers feel special and important, in keeping with the importance of the big day.

A leading nationwide bridal store has teamed up with our firm to design a mystery shopping program that dovetails with the bridal store's overall customer service evaluation efforts. The shopping reports are used as the basis for tutorials that are given once a month to all employees. Employees are

Retailers use mystery shopping to improve - not just measure - customer service



By Judith Ann Hess

Editor's note: Judith Ann Hess is founder and owner of Customer Perspectives, a Hooksett, N.H., mystery shopping firm. She can be reached at judi@customerperspectives.com.

engaged in role-playing and brainstorming activities with the goal of continuously improving customer service. Quarterly, the mystery shopping results are combined with responses to customer survey cards to produce a customer service scorecard. This scorecard measures how well expectations are being met, how store traffic is being managed, and what kind of first impressions are being created.

The management team of the bridal store feels the mystery shopping reports are particularly useful at measuring the customer's first impressions of the store and what factors make her decide if she'll return. As one executive notes, the typical bridal shopping experience is quite lengthy - sometimes as long as two years. Mystery shopping reports allow management to identify missed opportunities during a customer's initial visit - unlike customer service survey cards, which are sent to registered customers and focus only on the actual shopping experience. When viewed over time, trends and patterns emerge and can be addressed by the retailer. For example, because of frequent reports of long waits for service, management now instructs employees to encourage customers who call for directions and/or store hours to set up mid-week appointments to avoid the usually high traffic on Saturdays.

This retailer uses mystery shopping as an integral part of an overall customer service evaluation program

that trains and rewards employees for outstanding performance. It also provides management with a customer's perspective of their total shopping experience.

Case study: a swimwear store

A nationwide swimwear client has been using mystery shopping as part of its customer service program since 1999. Its corporate trainer says, "With a corporate office in Florida and stores nationwide, we feel this is the best opportunity we have to view the level of customer service we are providing our clients. We are able to identify staffing issues and training opportunities through the shops."

The retailer has over 30 stores nationwide. Staff varies from five to 15 employees per store, depending on sales volume. Individuals are not targeted for evaluation. Rather, random shops are performed with the expectation that the majority of the staff will be shopped over time.

"We have a strong customer service and sales focus," says a member of the firm's management team. "Our non-negotiable sales standards have been incorporated into the shop. These standards are very basic, such as greeting every customer as they enter the store and bringing additional items to the fitting room. The shops are a great training tool for us."

The company offers a reward of \$100 for every perfect mystery shop. On average, between five and 10

rewards are given out every month.

The mystery shops are taken into consideration for performance reviews and additional points are added for perfect shops. The district manager reviews the shops with the store manager, who then discusses the shop with their employee. The shops are tracked on a spreadsheet. Compliance on the non-negotiable sales standards is also tracked and weighted to be 50 percent of the shop score. Management has seen consistent, company-wide improvement. For example, in the past, as peak season approached, a decline in service was noted as busy employees tried to handle more than one customer. That specific selling situation was targeted and employees now have the tools to cope with several customers at once.

The mystery shopping program reinforces the company's training program. Employees receive thorough training on service expectations during their first few days on the job. Those first few days are spent role-playing with the trainer. Customer service expectations are explained and employees must demonstrate their understanding of the expectations before they are allowed to assist customers on their own.

Management believes this integrated approach serves both the employee and the customer well. By rewarding positive behavior and identifying training needs, the mystery shopping program ensures customer service remains at the top of the list for all employees at all times.

Improve, not just measure

These two firms demonstrate just a few of the ways clients have been successful in using mystery shopping as a tool to improve customer service. The dozens of other ways that mystery shopping can be used to grow market share through enhanced customer service are limited only by your imagination. | Q

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21st century mystery shopping

Integrated, total-customer-experience evaluations that measure what happens at every possible touchpoint. Automated, fast report distribution via e-mail. Web-based reporting. Digitally-recorded phone call evaluations. Hidden-video captures. High-resolution digital photos, embedded directly in online reports. Reports, call recordings and photos burned onto CDs. Rewards presented on-the-spot to client employees who perform well. Palm Pilots and laptop computers. Certified professional evaluators. Same-day report turnaround. Instantaneous, online summary capabilities presenting over 40 different formats, for true, real-time reporting. These are just some of the latest advances in the business tool known as mystery shopping.

Mystery shopping gives clients fact-based information from people thoroughly educated on what to look for in advance of conducting an evaluation. In the last few years, the technological advances in mystery shopping have been truly astounding. The difference between today's services and those of even the recent past is like that between instant messaging and the Pony Express. Some of you may recall the "old days" (actually just a few years ago) when paper-based reports were sent to clients via snail mail or faxed, often two weeks or more after the onsite visit. Many were in the shoppers' own handwriting and difficult to read. Cassette recordings of mystery shopper phone calls (if

any recording was even made) arrived two to four weeks after the call was placed. Requests for summaries, allowing managers to track historical performance, compare locations against each other, view results question-by-question across management levels, etc., required special requests to providers' IT departments, also took two weeks or more, and often had to be cut-and-pasted together.

Perhaps the greatest benefit of the recent advancements is that they have freed up mystery shopping companies from the systemic aspects of producing reams of paper reports and let them focus more on meeting their customers' needs. Other important benefits include:

- improved reporting turnaround times, from as much as three or four weeks to just 24-72 hours;
- more accurate report validation and verification capabilities;

New technologies give technique a boost



By Ron Welty

Editor's note: Ron Welty is president of IntelliShop, a Perrysburg, Ohio, mystery shopping firm. He can be reached at 877-894-6349 or at ron.welty@intelli-shop.com.



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- integrated reporting for multiple customer touchpoints, such as on-site, telephone and Web-based evaluations.

Digitally-recorded phone calls

One of the more interesting developments for clients in the realm of mystery shopping is the use of digitally-recorded phone call evaluations. Many companies rely on the phone for sales and service, and as the old saying goes, “You don’t get a second chance to make a first impression.” Mystery shopping providers can actually help clients evaluate their business way beyond the first impression; they can evaluate sales processes, ordering, issue resolution, and so on.

While some providers continue to make recordings and supply analog tapes to their clients, there can be delays in the time between the call and receipt of the tape – up to two weeks, if not more. Faster delivery usually requires overnight-mail charges. By then, possibly hundreds of other prospective customers, or upset current customers, have phoned a client location or call center. How many were actually converted to customers? How many could have been handled better and decided to go with the competition instead? Receiving a digitally-recorded call of the conversation, accompanied by a detailed evaluation report, helps clients understand what is happening in their business faster and lets them make better decisions on how to run their business to acquire and keep more customers. Another aspect many clients find helpful is having their calls burned to CDs, by management level (division, region, etc.), for use in training sessions, reviews, etc.

Links to Web-based call reports can be added to the digitally-recorded phone calls that allow clients to click on a link and listen to the actual call, start to finish, while viewing a written account of that call by the person who placed it. Virtually any

scenario that a business experiences over their telephones can be simulated. Employees “caught” taking great care of and appropriately handling a caller can be rewarded very quickly by their manager. If they do not handle a call appropriately, managers have an almost-immediate opportunity to review it with them, and retrain them on skills, processes and/or expectations. Doing so before they handle any more callers in the same, inappropriate manner is invaluable.

These calls also let managers hear the tone and emotion in the employee’s voice, as well as exactly what was said. Often, a person’s normal conversational voice is much different than their “telephone voice.”

For both manager and employee, these can be a helpful coaching technique when utilized properly. It also lets clients verify that the mystery shoppers are doing their jobs correctly, because they hear exactly what was said during the entire call. (Note: Each state has its own laws regarding recording of employee calls. Your mystery shopping provider should be able to readily educate you on the details to ensure your compliance with them.)

Digital photos

Digital photo evaluations are becoming increasingly popular facets of the mystery shopping process.

Evaluations are usually not announced to the location until the evaluator arrives, at which point they introduce themselves to the store manager and inform them that they are there at their company’s request to conduct a site evaluation that will include digital photos. Following a pre-established checklist of what to audit, including descriptions of specifically-scripted shots that the evaluators are provided before their visit, they then conduct the audit and take several digital photos. These photos:

- verify that expensive point-of-purchase materials make it to the

sales floor, remain in good condition, and are displayed correctly;

- assure that areas within stores that are leased by manufacturers follow company guidelines;
- let manufacturers know that retailers are getting their products to the floor, and displaying them correctly;
- provide deeper understanding about sight-lines and other marketing/sales opportunities within stores;
- replace valuable field employee time by outsourcing audit functions to mystery shopping companies;
- can be linked directly within an evaluation report, allowing clients to view the report and the photos simultaneously.

You’ve got mail

E-mail has advanced the speed of reporting in the mystery shopping industry dramatically. In the not-too-distant past, providers would mail out assignments to their shoppers, who would hand-write their reports and mail or fax them back. The reports would be given a quick scan by a proofreader, sometimes hand-corrected, and forwarded to the client – again, usually via mail or fax. A span of three to four weeks between the shop and the report was not uncommon.

Some providers eventually developed databases into which the reports were entered by a data entry team. At the end of the month, if any roll-up/summary reporting was provided at all, it may have been cut-and-pasted.

Today, fully integrated solutions, marrying back-office functions such as a shopper database, screening and scheduling of shoppers, and accounting, are used by some providers. Web-based reports, ready for the client to view the same day of the visit or within about 48 hours, are always a main benefit of such systems. Some systems allow for reports to be sent automatically via e-mail, simultaneously to multiple people, such as the owner, regional managers

and each site manager. Viewers can compare locations, management levels, even drill down to a question-by-question analysis, over the entire history of their mystery shopping program and/or for specific date ranges.

Shopper certification takes off

In late 2002, an industry-wide effort to help improve overall skills and assist members in improving the quality of reporting was undertaken by the Mystery Shopping Providers Association (MSPA), which began offering a certification process for interested mystery shoppers. There are currently two certifications available: silver and gold.

Silver certification requires a shopper to attend an online educational program, followed by a comprehensive test about general mystery shopping skills. If they pass, they are awarded silver certification. Gold certification is open only to shoppers with silver certification, and requires shoppers to attend a one-day seminar, held in approximately 25 locations annually throughout the United States. These seminars cover the issues shoppers are required to know and comply with in the course of their duties. As of this writing, almost 22,000 shoppers were awarded silver certification, and more than 2,000 were awarded gold certification, so over 24,000 shoppers have been certified by MSPA in just two years!

Clear advantage

Today's mystery shopping programs are sophisticated, proven business tools that, executed and used properly, provide clients with a clear strategic advantage over their competition. Using the latest technologies, certified shoppers, advanced analytical tools and other professional methodologies, mystery shopping providers have assisted their clients in improving how customers and potential customers are assisted on-site, on the phone, and online; and helped improve customers' overall experiences, with the aim of generating greater customer loyalty. | Q

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Survey Monitor

continued from page 8

prised by how many more roofing questions came from women than men.”

Where listeners live also has a huge impact on their concerns. Consumers in the South were far more interested in doing projects themselves than those in the Northeast. Floor coverings were a big concern for those in the Midwest, heating and air conditioning was an unusually high level concern for those in the South and West, and Northeastern consumers, who must batten the hatches for winter, were very concerned about issues like indoor air quality and mold. For more information visit www.888moneypit.com.

Bank branch location draws lots of interest

Findings from “Checking: Portals to Profitability,” a report from Chicago research firm Mintel’s new finance series, reveal that the most common reason consumers select their bank is branch location. In response, banks are adding branches at an unprecedented pace.

Mintel’s own consumer research found that three-quarters of consumers indicated that the location of branches is an important factor in choosing a checking account provider. The second-most popular criterion, at 71 percent, was the reputation of the provider. In response, banks have drastically increased their branch expansion efforts – 20 percent in the last 14 years. Despite the ongoing market shakeout that has slashed the number of institutions by more than a third since 1990, the branching craze shows no signs of letting up. Between 1990 and 2004, checking account providers dwindled by about 38 percent to under 8,000 banking institutions. But in the same time period the number of bank offices, or branches, actually surged forward by 20 percent, from 62,723 to 74,978 locations.

The traditional checking account business model, dependent on paper checks, is clearly in decline.

Between 1979 and 1995, the volume of paper checks issued annually in the U.S. increased, from about 33 billion to approximately 50 billion. However, since that time, the volume of paper checks has plunged by about 26 percent, and is expected to reach only 36.5 billion in 2004. Paper checks are giving way to alternative forms of payment, such as e-banking and debit cards.

Since their introduction, both ATM and debit cards have reduced the need for paper checks and for interactions with tellers.

The trend in market size for consumer checkable deposits has been almost steadily declining: the dollar volume of checkable deposits has been cut in half, from almost \$402 billion in 1997, to only \$191 billion in a sustained market shakeout. But, despite the shakeout, remaining competitors are still furiously building out their branch networks. Mintel estimates that by 2008, checkable deposits will decrease by 12 percent over 2004 mainly due to trends in online banking and debit cards. For more information visit www.mintel.com.

Internet broadcast audience listens while it shops

A new study by New York-based Arbitron Inc. and Edison Media Research estimates the monthly audience for Internet broadcasting to be 51 million people, with half living in households with an annual income of \$50,000 or more. The study, “Internet and Multimedia 12: The Value of Internet Broadcast Advertising,” also found that the monthly Internet broadcast audience, people who listened to or watched Internet radio and television in the past month, accounts for 42 percent of all estimated online expenditures.

A significant portion of Internet broadcast consumers shop and pur-

chase online while listening to Internet radio:

- Just under half (42 percent) of Internet radio listeners have listened to Internet radio while researching a product or service online.

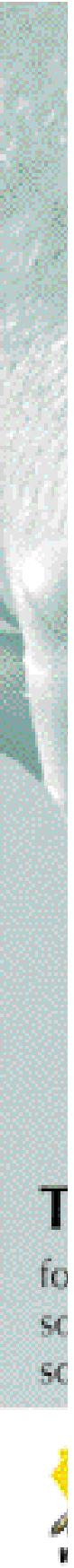
- Twenty-seven percent of people who tune to Internet radio have listened while making an actual purchase online.

The study focuses on the opportunity Internet broadcasting affords advertisers. Sixty percent of monthly Internet broadcast consumers use programs to block pop-up advertising online and 43 percent also block banners. Commercials inserted directly into online programming are not affected by this software.

“Internet broadcast consumers spend more time online, shop more often online and spend more money when they do shop,” says Bill Rose, vice president and general manager, Arbitron Internet Broadcast Services. “The irony is that these consumers also go out of their way to eliminate most advertising from their online experience. Internet broadcast commercials may be the best way to reach these key consumers while purchasing decisions are being made.”

The study also reveals 21 percent (51 million people) consume Internet broadcasting on a monthly basis compared to 12 percent (30 million people) that used it in the week before the survey. “Therefore, advertisers who run their Internet broadcast commercial schedules for at least one month can almost double the reach of their campaign,” says Pierre Bouvard, president, Arbitron New Ventures.

It was also shown that Internet broadcasting delivers a higher concentration of the elusive young, male demographic. Fifty-three percent of monthly Internet broadcast consumers are ages 12-34 compared to 37 percent of the general U.S. population. Sixty percent of monthly Internet broadcast con-



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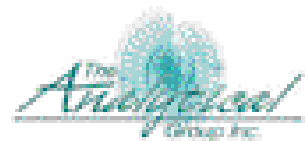
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sumers are male compared to 47 percent of the general U.S. population.

“Internet broadcast consumers skew younger and are more often male,” says Larry Rosin, president, Edison Media Research. “They also spend 10 percent less time with television on a daily basis, making Internet broadcasting a key medium for reaching this hard-to-reach audience.”

Additional findings from the study include:

- Twenty-four percent of all Americans had residential broadband Internet access at home as of January 2004. Half of monthly Internet broadcast consumers had broadband access at home.

- Fifty-four percent of monthly Internet broadcast consumers say they would be “very or somewhat interested” in listening to Internet radio on a form of CD Walkman-type device or cell phone.

- One in five Americans (20 percent) owns more than 20 DVDs.

The findings reported here are based on a January 2004 survey consisting of 2,290 telephone interviews with a randomly selected national sample of Arbitron’s Fall 2003 radio diary keepers. Since 1998, Arbitron and Edison Media Research have conducted 12 studies of the Internet and streaming media – one every six months. This latest study, as well as previous studies, may be downloaded free of charge via the Arbitron and Edison Media Research Web sites at www.arbitron.com and www.edisonresearch.com.

Buyers turn to Sunday circulars

Do the dozens of circulars you get with your Sunday paper get read or tossed on the spot? According to a study by New York-based Ipsos-Insight, 80 percent of Americans look at Sunday circulars with some degree of regularity, and many actually look forward to receiving new ones every week. “With 70 percent

of Americans reading the Sunday paper every week, compared to 50 percent on other days of the week, the Sunday circulars have a better reach than the Super Bowl or the latest hit show of the month,” says Nicole Valenti, a senior analyst with the firm’s retail practice. The study reports that 39 percent of Americans “look forward to browsing the circulars just to see what’s there” and 25 percent “look for the best deals.”

“Both of these behaviors are dominated by women, while men tend to look at circulars when they’re considering buying something specific,” says Valenti. When it comes to categories like consumer electronics, which are heavily promoted in Sunday circulars, 39 percent of Americans claim to have looked at them in the past week, with another 17 percent in the past month. Large retailers like Wal-Mart and Best Buy dominate the consumer electronics shopping experience, with 46 percent and 41 percent of Americans having shopped at one of these stores in the past six months for a consumer electronics product. Other national retailers and heavy circular advertisers like Target and Circuit City earn about 30 percent and 25 percent of these shoppers’ visits, respectively. Online retailers like eBay (10 percent) and amazon.com (8 percent) get far less shopper traffic.

When it comes to buying a consumer electronics product, 57 percent of Americans are likely to “go to the store for a particular item on sale,” and 52 percent “look in the local paper for retail advertisement offerings.” Thirty-nine percent will “go online to compare prices” and 23 percent will “purchase online.”

The national survey research data was collected via Ipsos U.S. Express, a weekly national omnibus survey. Fieldwork was conducted between November 3-5, 2004. Data are based on 1,000 telephone surveys taken with adults (18+) across the United States using regionally-

stratified random sampling. The margin of error is ± 3.1 percentage points. For more information visit www.ipsos-insight.com.

Public rates government agencies highly

When asked about 11 different government agencies, majorities of the public claim they understand what they do. They also give all 11 agencies positive ratings. The Centers for Disease Control (CDC) tops the list receiving the most positive votes, as it has for the past few years. More than eight in 10 adults say they understand what the CDC does (86 percent) and give it positive marks (84 percent).

In terms of doing a good job, next on the list is the Federal Aviation Administration (FAA) with 77 percent positive, the National Institutes of Health (NIH) with 71 percent, the Food and Drug Administration (FDA) with 65 percent, and the Federal Bureau of Investigation (FBI) with 64 percent.

At the other end of the list, the federal agencies with the lowest marks are the Social Security Administration at 51 percent positive, the Environmental Protection Agency (EPA) with 53 percent positive, the Central Intelligence Agency (CIA) also with 53 percent positive and the Internal Revenue Service at 54 percent positive.

These are the results of a nationwide Harris Poll of 2,114 U.S. adults surveyed online by Harris Interactive, Rochester, N.Y., between October 20 and 25, 2004.

Harris Interactive has asked these questions four times since 2000 and it is clear from these results that public attitudes toward federal government agencies are quite volatile, moving up or down sharply in response to events.

Just over half of the agencies have showed declines in their positive ratings from last year and the remaining five have increased their positive ratings.

Those with most significant declines are the NIH (dropping nine percentage points from 80 percent positive in 2003 to 71 percent positive in 2004) and the CDC (declining six percentage points from 90 percent positive in 2003 to 84 percent positive in 2004) and the FBI (from 69 percent positive in 2003 to 64 percent positive in 2004). While the ratings for the NIH and the CDC have dropped, nonetheless their positive marks are still very high, topping the list of the agencies and reflecting the public's perceived goodwill about these agencies.

A few agencies had relatively modest positive increases including the SEC (increasing by five percentage points from 57 percent in 2003 to 62 percent in 2004). This increase probably reflects the media attention the SEC has received prosecuting a number of high-profile cases including Martha Stewart. Other positive increases included the Department of Homeland Security, IRS and the Social Security Administration - each increasing by three percentage points.

A number of the agencies measured are directly involved with fighting terrorism or maintaining security domestically. The FBI and the CIA have had slight declines in their positive marks, reflecting the significant criticism both agencies have received over the past year. The Department of Homeland Security positives have increased and, given that there hasn't been a new terrorist attack within the U.S. since 2001, this may not be that surprising. In addition it is worth noting that once again the Federal Aviation Agency (FAA) has improved its rating very slightly from 76 to 77 percent positive. This is the highest rating this agency has received, reflecting perhaps the improved security at airports (for which the Transportation Security Administration, not the FAA, actually is responsible), a reduction in late and delayed flights, or just because there has not been another

hijacking since September 11, 2001. For more information visit www.harrisinteractive.com.

San Fran is tops in coffeehouse patronage

San Francisco is the top local market for coffee bar patronage, according to a study by Scarborough Research, New York. San Franciscans are more than twice as likely as the national average to have been to a coffeehouse in the past month. More than one-quarter (26 percent) of Bay Area adults frequented these establishments during the past 30 days. Seattle (23 percent), Portland, Ore. (21 percent), San Diego (20 percent) and Sacramento, Calif. (20 percent) round out the top five markets for coffee bar patronage. Nationally, 12 percent of adults have been to a coffee bar during the past month.

Coffee bars attract a young, afflu-

ent and educated crowd. Patrons are 22 percent more likely than all consumers to be aged 18-24 and 65 percent more likely to have an annual household income of \$100K+. They are 28 percent more likely than the average American adult to be single and 70 percent more likely to have a post graduate degree. "The coffee bar industry has exploded in recent years. While Scarborough's local market analysis reveals that the West coast has the highest percentage of coffee bar patrons, we can also see that popularity has spread across the nation," says Alisa Joseph, vice president of advertiser marketing services, Scarborough Research.

"Customizing the coffee bar experience to the interests of consumers in local markets can help coffee franchises increase brand loyalty and further market penetration." For more information visit www.scarborough.com.

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Product and Service Update

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has conducted a show red-cost study entitled: Defending Against Asian Soybean Rust. The research objectives were to measure soybean growers' awareness of Asian soybean rust in the United States and determine defensive steps growers were taking to prevent this disease in their 2005 crop.

The USDA confirmed on November 10, 2004 that Asian rust had appeared on leaf samples taken from two Louisiana State University test plots. This was the first reported incidence of Asian rust in the U.S. The study will offer insight into how soybean growers are reacting to this news and how they plan to defend against Asian rust. In early December 2004, Doane conducted a telephone survey of 750 growers in an 11-state area that grew a minimum of 250 acres of soybeans in 2004. For more information visit www.doanemr.com.

Online panel of physicians doubles

EQuesta, the online division of London-based Fieldwork International, has announced that its panel of European physicians has doubled in size over the past year to 19,000 and is currently growing at a rate of 2,000 physicians per month. Working in partnership with its U.S. partner panel, it now offers an international service to clients on both sides of the Atlantic. During the first nine months of 2004, eQuesta conducted nearly 12,000 interviews online with physicians, primarily in

Europe - double the number completed during 2003. For more information visit www.fieldworkinternational.com.

German firm offers new ad testing product

MediaAnalyzer Software & Research GmbH, a German market research company, is offering a new research tool to the U.S. market. The product, called AttentionTracking, lets clients test advertising for visual impact, and is designed to help improve advertising effectiveness and ROI.

AttentionTracking can both pre-test and copytest advertising media. Because it is online-based, the method can test any number of respondents in any number of places. It uses a respondent's PC and its mouse as a pointing-device to track their attention and their gaze when looking at an image. MediaAnalyzer offers

AttentionTracking as a full-service product or as a licensed product to brands, to market research companies, to ad agencies, and to publishers. For more information visit www.media-analyzer.com.

ESRI releases ArcGIS9

ArcGIS Business Analyst desktop software, with enhanced functionality and a variety of data, is now available for the ArcGIS 9 platform from Redlands, Calif.-based ESRI. ArcGIS 9 includes a new geoprocessing framework for modeling and scripting, new spatial statistics tools, improvements to annotation and labeling, improved raster support, and global positioning system

support. Data in this release of ArcGIS Business Analyst includes Community Tapestry from ESRI Business Information Solutions (ESRI BIS). Tapestry is a segmentation system that provides a description of America's neighborhoods by classifying them into 65 segments based on their socioeconomic and demographic compositions. In addition to Tapestry, ArcGIS Business Analyst is shipped with a library of business data from infoUSA; the

Dynamap/Transportation street network from Geographic Data Technology, Inc.; ESRI BIS demographic data; census boundaries; designated market area boundaries; National Research Bureau shopping center data; zip code boundaries; and a set of basemap data for comprehensive analyses. For more information visit www.esri.com/businessanalyst.

New facilities

Observation Baltimore has added a new suite to its focus group facility. It is designed for multi-configurations, such as a doctor's office, living room, store, etc. The focus suite offers a secure observation room. The suite offers audio, video and DVD recording. The conference room holds 10 participants and a moderator. The bi-level observation room accommodates eight clients. With the addition of the second suite, the clients now have a choice of two suites. The first suite has larger rooms, with the second suite offering a more intimate, casual setting. For more information contact Jessica Pruitt at 410-332-0400.

Briefly

Oslo-based research software company FIRM has released a new version of its Conconfirm program. Conconfirm 9.0 includes a new interface; a random data generator enabling automated testing of questionnaires; a real-time script checker for on-the-fly script validation; block randomization of questions to avoid respondent bias; and Reportal BitStream for online tabulation on high volume of responses. For more information visit www.conconfirm.com.

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Research Industry News

continued from page 14

Washington, N.Y., has acquired control of the **Parkod** companies: Parkod France and Parkod Europe. With this acquisition, The NPD Group will now leverage Parkod's software, brands and databases with NPD's BeautyTrends service. Claude Charbit has been named chairman of Parkod.

Alliances/strategic partnerships

Sterling, Va.-based competitive intelligence firm **Current Analysis, Inc.** and **Sage Research**, Natick, Mass., have formed an alliance to deliver customer-informed competitive response analysis and market strategy recommendations. The partnership will combine competitive intelligence and analysis with primary end-user research, and offer clients of the respective firms a suite of competitive response tools.

Fairfield, Conn.-based **Survey Sampling International** is partnering with Stephen Jenke to develop both a presence and a SurveySpot Internet panel in Australia. SSI projected that its SurveySpot Internet panel in Australia would comprise 130,000 household members representing 50,000 e-mail addresses by the end of December. Jenke is managing director of Information Research Management Pty. Ltd., a specialist consultancy in the deployment of online survey software and systems integration.

Association/organization news

Three associations representing about 200 market research firms in Canada have merged to create one national body intended to "promote and enforce rigorous professional standards." **The Marketing Research & Intelligence Association** (MRIA) began operating January 1st. It is made up of members of the Canadian

Association of Market Research Organizations, the Canadian Survey Research Council and the Professional Marketing Research Society.

Among other things, the MRIA will audit member companies to ensure that best practices are used and industry standards are maintained. It will also operate the School of Marketing Research and certify qualified professionals. In addition, it offers a toll-free number (800-554-9996) which consumers can call to verify the legitimacy of research projects and to register complaints.

"Creating one concerted voice greatly strengthens our position as a leader in corporate responsibility by helping us to promote and enforce rigorous professional standards," Don Mills, president of the new association, said in a statement. "The public benefits by receiving greater assurances that the person they are sharing their attitudes and opinions with is a legitimate researcher, working for a certified, accredited and auditable organization, compliant with some of the highest professional standards in the world."

The Marketing Research Institute International (MRII), Rocky Hill, Conn., has named Betsy J. Peterson director emeritus of the organization. Peterson was the original founder of MRII (formerly known as the Marketing Research Association Institute) in 1995. During this time, she held the position of executive director of the Marketing Research Association.

In 1994, under Peterson's leadership, a task force was formed to determine the feasibility of creating a separate non-profit organization to create educational and training materials for the marketing and opinion research industry. This was fueled by a desire to create an independent study program based on the Marketing Research Core Body of Knowledge developed by William Neal of SDR, Inc. and Malcolm McNiven of the University of Georgia. Approval was given and

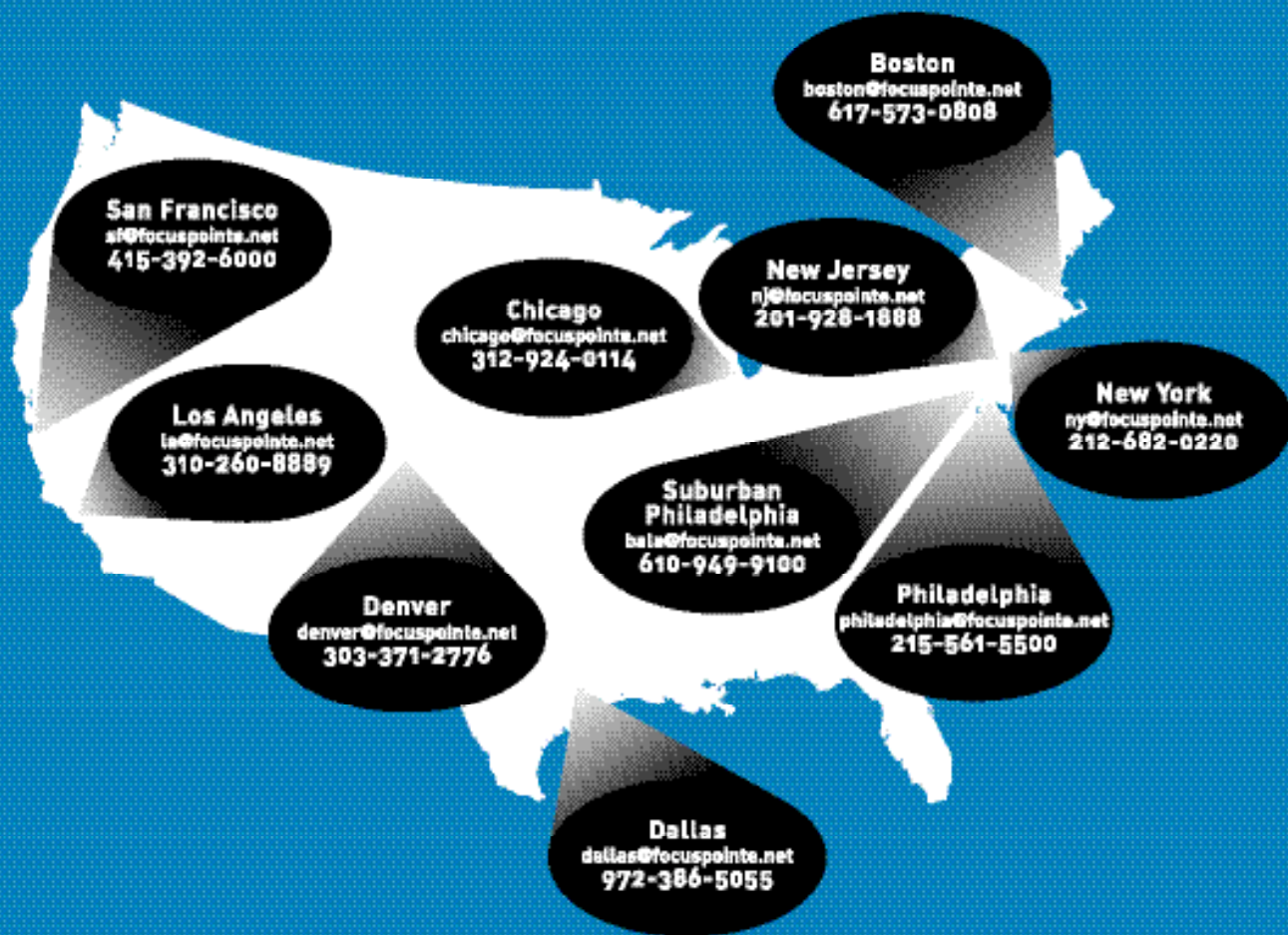
funds allocated in 1995 to establish the Marketing Research Association Institute.

MRAI was formally incorporated in June of 1996 and was granted non-profit status as a 501(c)3 educational foundation by the IRS. In 1998, the organization officially changed its name to MRII. Peterson held the title of executive director of MRII from 1996-2002. Her active role in the creation and development of MRII has earned her the honor of being named director emeritus. She joins Neal and McNiven as the third individual so distinguished by the organization.

The Council for Marketing and Opinion Research (CMOR), Wethersfield, Conn., has named Harry E. Heller director of respondent cooperation. Heller will be responsible for two overlapping initiatives: helping the marketing and opinion research industry develop best practices for enhancing consumer cooperation, and educating consumers as to the importance of participating in survey research.

"Respondent cooperation can be increased in two ways: by improving what we do and by reaching out to the public to help them understand why their cooperation is important," Heller said in a statement. "Research companies need to train their interviewers to ensure that their surveys are interesting; identify respondent incentives to encourage cooperation; enable respondents to be interviewed at convenient times; and we must let the public know that their opinions will be kept confidential and their privacy will be protected. Ultimately, the public should know that opinion research is the best way by which political and business decision makers can make decisions driven by their input."

"Harry Heller brings to this position a wealth of experience and great industry visibility," said Kathy Pilhuj, chairman of the respondent cooperation committee, CMOR. "Improving the public's perception



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of surveys is an area in which Harry has done extensive research and writing. He comes to CMOR with a long-term goal of making the public more interested in and motivated to understand the role of surveys in our society and to be more willing to provide their opinions.”

Awards/rankings

Harris Interactive, Rochester, N.Y., has been named to the 2004 Deloitte Technology Fast 500, a ranking of the 500 fastest-growing technology companies in North America. Rankings are based on percentage revenue growth over five fiscal years, from 1999 to 2003. Harris Interactive grew 351 percent during this period, from approximately \$29 million to \$130.6 million in revenue.

The title of “Best Research Company in Spain” (2003–2004) has been awarded to **Milward Brown** Spain by *Premios Control*, a research and marketing magazine.

Maritz Research, St. Louis, has been awarded the United States Postal Service (USPS) Quality Supplier Award for helping the USPS make an impact on supply chain management, and achieve positive, bottom-line results. Maritz’ nomination was prepared and submitted by a Postal Service Contracting Officer’s Representative, and reviewed by an independent panel of USPS evaluators. Maritz Research received the USPS Quality Supplier Award for its development and execution of the organization’s mystery shopper program (see related article on p. 38). During this program, Maritz conducted more than 66,000 mystery shopper evaluations to assist the Postal Service in maintaining customer service and image standards. After analyzing the results of the Mystery Shopper program, Maritz identified opportunities for the USPS to increase revenue and customer satisfaction. Due to the quality standards applied to this program

and the data collected as a result, Maritz Research was nominated and ultimately won the Quality Supplier Award.

A paper by employees of New York-based **Ipsos Loyalty** that examines the positive relationship between customer satisfaction and actual share-of-wallet in a business-to-business environment won the Excellence in Service Research Award for 2004 from the *Journal of Service Research*. Authors Timothy L. Keiningham and Tiffany Perkins-Munn of Ipsos Loyalty, and Heather Evans, an employee at a financial services company, won the award for their article, “The Impact of Customer Satisfaction on Share-of-Wallet in a Business-to-Business Environment.” The article appeared in the August 2003 issue of the *Journal of Service Research*.

New accounts/projects

New York-based **Nielsen Media Research** and **NBC Universal** have signed a seven-year contract for audience measurement services covering all of NBC Universal’s national and local television businesses. This includes the NBC Television Network, NBC Enterprises/NBC Universal Domestic Television, Telemundo, the cable networks Bravo, CNBC and MSNBC, USA Network, and SCI FI Channel, the 13 NBC-owned-and-operated television stations, and the 11 Telemundo television stations.

ESA, a U.K.-based retail and trade research firm, has been contracted by **Skillsmart Retail** to conduct an analysis of the retail sector in Wales. The project will combine a variety of research methodologies, encompassing mystery shopping, street interviews and town center assessments, and will aim to map out the training needs within the retail sector in Wales.

Arbitron Inc., New York, will survey the radio listening of

Chinese-American consumers using bilingual Chinese-English diaries in the Los Angeles and New York metropolitan radio markets in Winter 2005. This is the first time the company will use the Chinese-language version of its standard radio diary to track the listening habits of Chinese-Americans. The study will be done on behalf of Multicultural Radio Broadcasting, Inc.

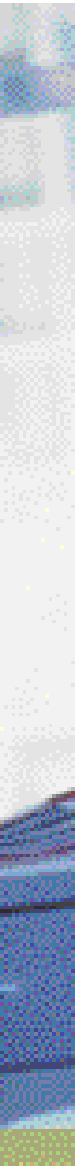
The study will take place during the Winter 2005 Arbitron survey period (January 6–March 30, 2005) among Chinese-speaking consumers, age 12 and older, in the Los Angeles and New York radio metros. Each survey will have in-tab samples of 500 Chinese-speaking individuals.

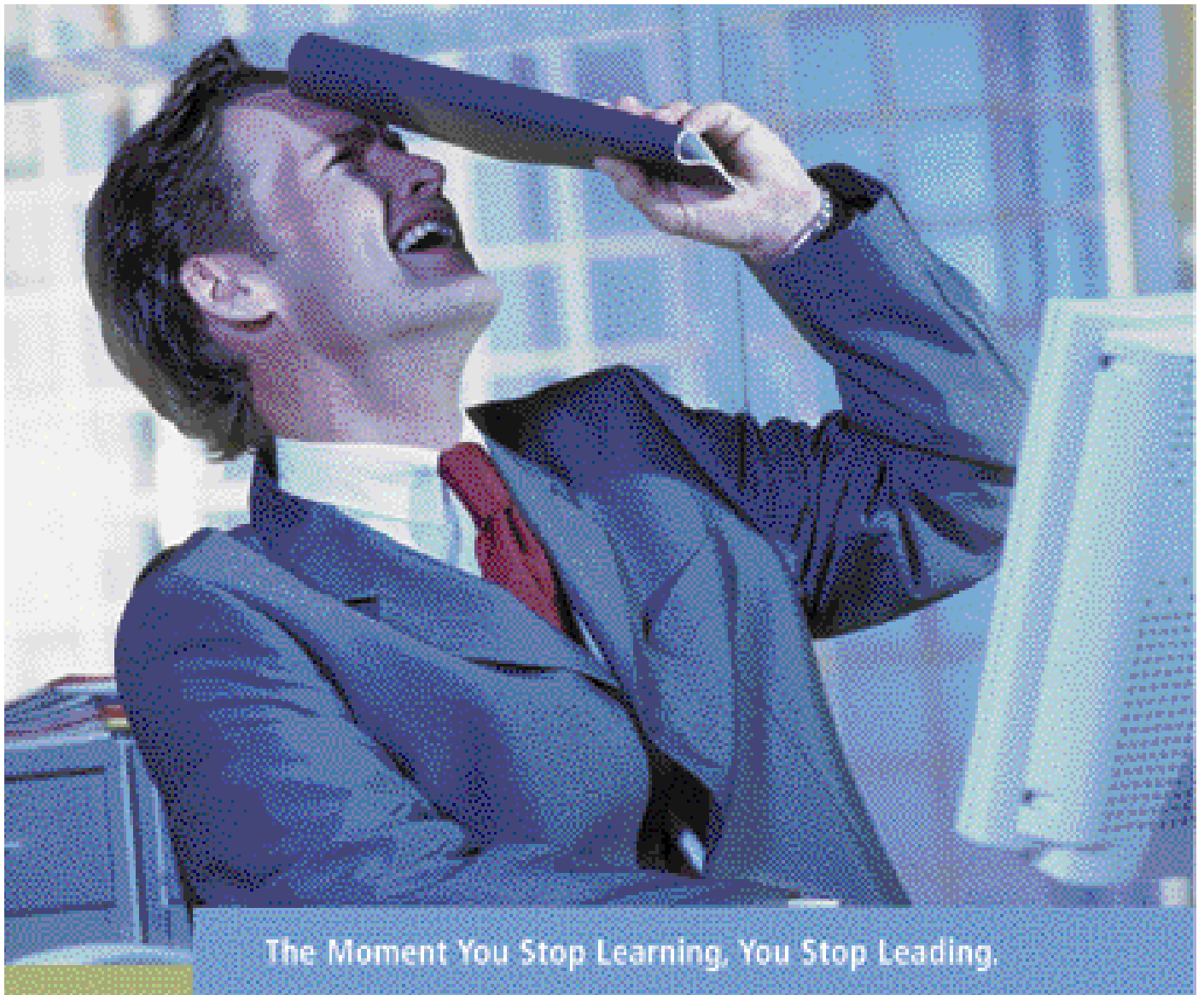
The data will be released following the delivery of the Winter 2005 syndicated Arbitron market reports. The study will be available for purchase by advertisers, agencies and broadcasters.

New York-based **Simmons** has signed **Sirius Satellite Radio** to a multi-year agreement for the Simmons National Consumer Survey (NCS). Simmons Spring 2004 Unified Hispanic and National Consumer Survey reveals over three million adults 18+ already subscribe to satellite radio and over 5.5 million plan to subscribe in the next 12 months. The study also examines the demographics of consumers who plan to subscribe to satellite radio in the year and finds that men are 9 percent more likely than the average consumer to plan to subscribe; potential subscribers are 30 percent more likely to be age 25–34; they are 38 percent more likely to be single and the mean household income of adults planning to subscribe to satellite radio is \$74,066 (7 percent above the national average).

Company earnings reports

Paris-based **Ipsos** generated consolidated revenues of 427.8 million euros in the first nine months of 2004, an increase of 6.7 percent





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over the same period in 2003. At constant scope and exchange rates, growth was 8.2 percent. Movements in exchange rates dragged revenues down by 4 percent.

The scope of consolidation has changed little since 2003, with newly-integrated companies accounting for 2.3 percent of total revenues. South Korean company Active Insights entered the scope of consolidation on January 1, 2004, and TQA (Australia) and Hispania Research (Puerto Rico) on July 1, 2004.

The renewed growth trend in Europe remained in place, despite a slight slowdown compared to the first half of 2004, due to a less favorable base for comparison. In North America, organic growth stabilized at 6 percent. The proportion of revenues coming from online data collection systems is continuing to rise, and is now above 50 percent in some businesses. This trend is putting temporary pressure on growth in billings.

Germany-based **GfK Group** has continued its successful path of the first six months into the third quarter. The target sales figure was EUR 487.1 million, which is 13 percent more than that of the same period in the previous year. Rising by 24.5 percent to EUR 58.3 million, EBIT after income from participations once again increased at a higher rate than sales. At 12 percent, the sales margin remained a percentage point above the previous year. Consolidated total income rose to EUR 34.6 million with the result that after nine months it was already greater than that of the previous year as a whole (EUR 33.3 million).

In the first nine months of 2004, GfK invested EUR 72.2 million (previous year, EUR 38.1 million). Seventy-eight percent of these investments concern acquisitions and companies in which GfK has increased its shareholding.

The Group's five business divisions have witnessed growth. GfK's Consumer Tracking division increased its sales by 5.1 percent, of

which 5.4 percentage points were attributable to organic growth. Sales in Healthcare improved by almost 57 percent compared with the same period in the previous year. The increase is essentially attributable to the GfK Group's acquisition on July 1, 2003 of a 51 percent share in V2 GfK, USA, and of a 100 percent share in GfK m2A, France, at the beginning of 2004.

With its sharp growth rate, the Retail and Technology division contributed significantly to the success of the GfK Group as a whole. Sales increased by 10.8 percent. Organic growth amounted to 9.1 percentage points and there was acquisition growth of 2.2 percentage points.

There was organic growth of 1.9 percent in the Media division. Currency effects reduced growth by 0.5 percent. The operating income was 6.4 percent lower than that of the previous year. This was partly due to the costs incurred for contract tenders to measure TV viewer ratings in Russia, radio audience ratings in Belgium and to create a Media Usage Panel in Russia with its newly developed measuring technology, MediaWatch. As a result of this, the margin was half a percentage point below that of the first six months, standing at 10.5 percent.

With the highest numbers of sales, GfK's largest division, Custom Research, has recorded growth of 13.8 percent. Almost a third of this is attributable to organic growth. Operating income rose more sharply than sales. The positive growth is mainly due to the successful activities of GfK Marktforschung in Germany, and GfK Arbor in the U.S.

GfK Group Services, GfK Data Services and GfK Business Solutions & Processing essentially provide core services for the Group and their cooperation partners. The drop in sales and operating profit is notably due to the reduced volume services provided by GfK Business Solutions & Processing for Information Resources GfK.

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



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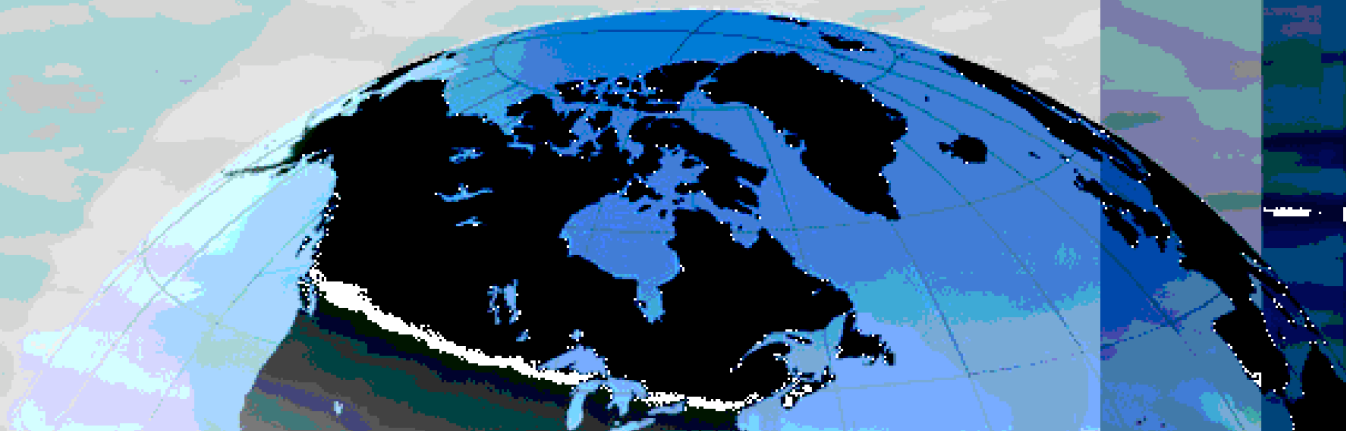
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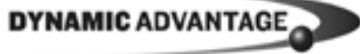
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S

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 SalZorich@aol.com
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 Hilli Dunlap Enterprises, Inc.
 HR and Associates, Inc.
Informa Research Services, Inc.
The Insight Works, Inc.
 Ipsos Polska
 Jameehnegar Marketing Research Institute
 JKS Inc. Market Research
 Just The Facts, Inc.
 Lodge Service - React Surveys NV/SA
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Market Viewpoint
 Marketing Solutions Corporation
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 REACT Surveys Ltd.
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 RQA, Inc.
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Austria

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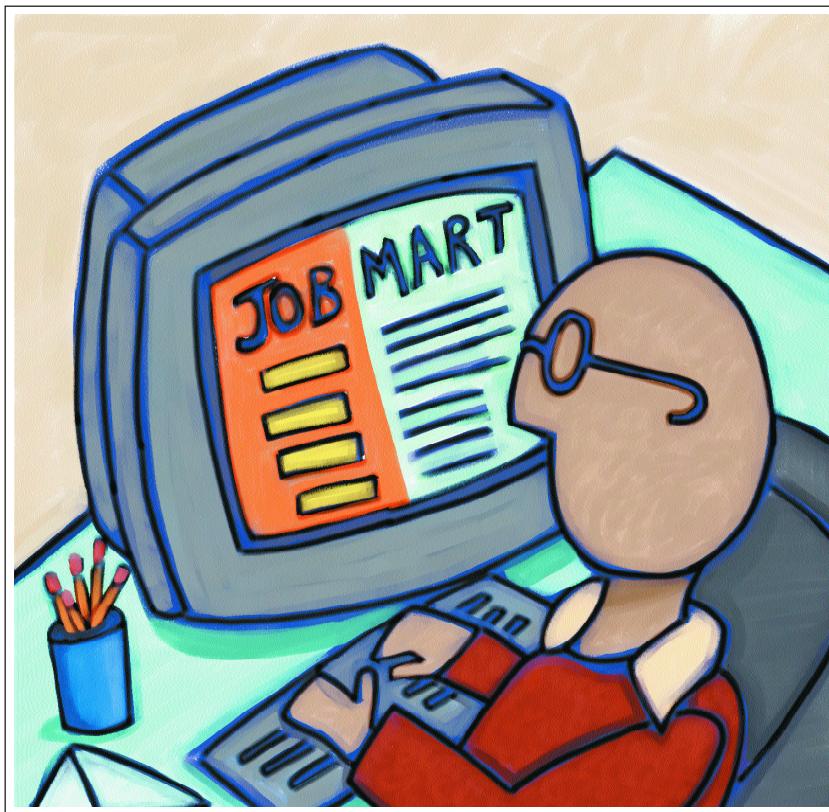
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Pakistan

Startex Marketing Services

Peru

Datum Internacional SA

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Puerto Rico

The Marketing Center

Slovenia

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GfK Turkey

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Quality Eye

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A Total Resource Group
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IRI Information Research Inc.
Opinion Polling Service®

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United Marketing Research

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Orlando, FL

Product Insights, Inc.

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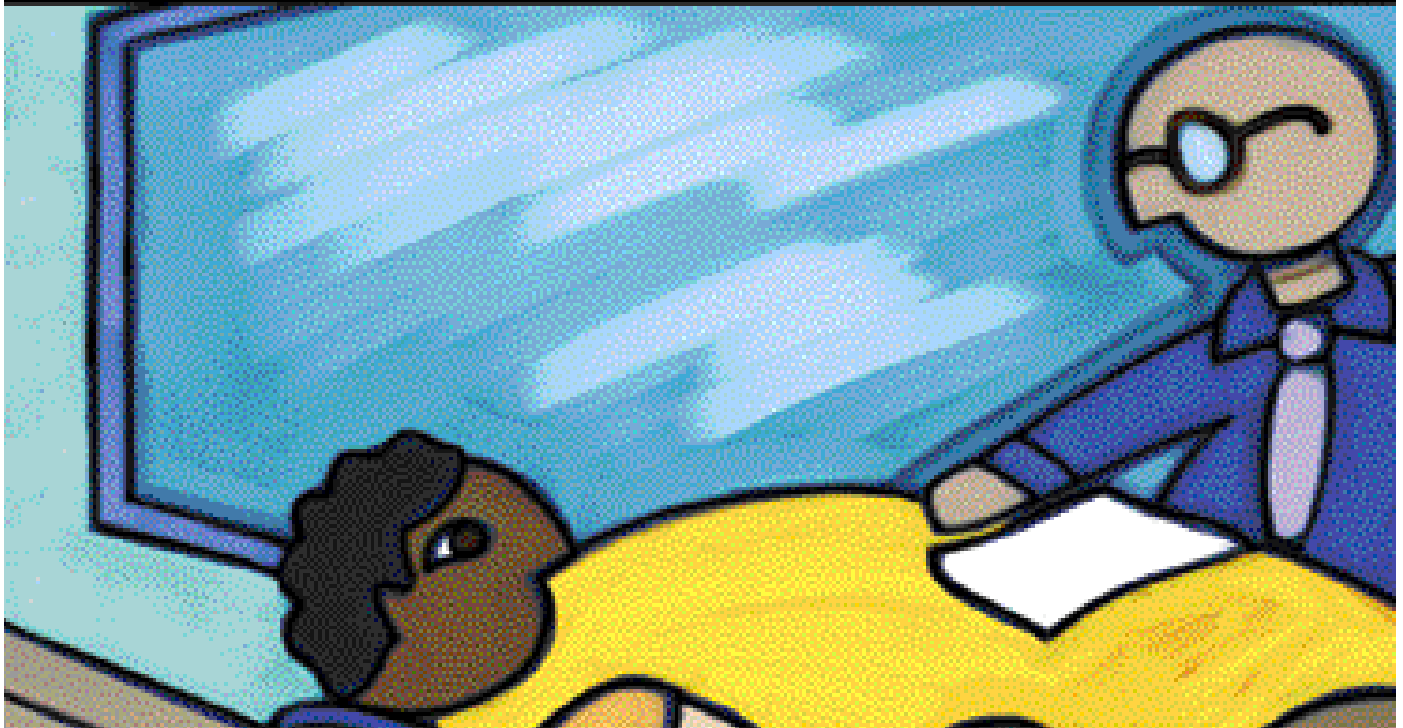
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Quirk's Marketing Research Review, (ISSN 089 37851) is issued 11 times per year – Jan., Feb., Mar., Apr., May, June, July/Aug., Sep., Oct., Nov., Dec. – by Quirk Enterprises, Inc., 8030 Cedar Ave., Ste. 229, Bloomington, MN 55425. Mailing address: 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.

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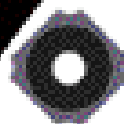
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