ESOMAR Worldwide Internet Conference - Net Effects
(Barcelona, February 11-13, 2001)

New QualiQuant™ Technology: Accelerating Innovation on the Web

By
John S Pawle, Second Sight International
Peter Cooper, CRAM International Group

Introduction

The prevailing business climate these days is increasingly competitive, pushing marketers not only to innovate but also to achieve this faster than the competition. International competition, fragmented and demanding markets, diverse and rapidly changing technologies, and increasing parity products, are all placing intense pressure on companies to shorten the innovation process and speed up time to market. Superior performance in product development and innovation is one of the main sources of competitive advantage in the modern market place.

This paper addresses the issue of speeding up and improving the contribution of consumer research to the Innovation process by using QualiQuant™ methodology on the Internet.

Voice of the Consumer

We know that building in the voice of the Consumer to the innovation process is a key success factor. In fact, it is one of, if not the most important factor in determining why NPD projects succeed, as shown in extensive research with Managers in the US, Europe and Japan (Cooper, 1999). Conversely, ideas that do not incorporate the voice of the consumer fail. Critical success factors for New Product Development and Innovation have been found to be:

1. Solid up-front homework - define the product and justify the project.
2. Voice of the customer - dedicated listening, observation and analysis.
3. Product advantage - differentiated, superior consumer value.
4. Sharp, stable, and early product definition.
5. Well-planned and adequately resourced launch.
6. Tough go/kill decision points.
7. Cross-functional teams with strong leaders.
8. International orientation.

Reaching the market faster and more effectively with products and concepts that meet consumer needs and expectations therefore create significant competitive leverage.

The dilemma however, is that rigorous market research with each element of a brand extension or brand new mix tested in sequence, tends to have the opposite effect. It slows down time to market. So how can we accelerate time to market and still ensure that innovation is consumer focused?

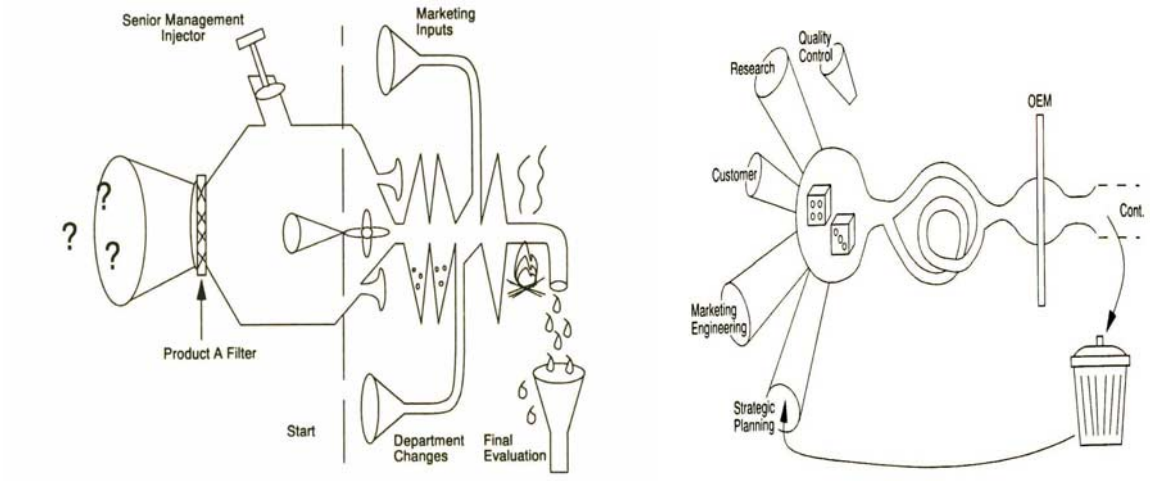
Part of the answer lies in having a flexible innovation management process. But the other part lies in utilising new innovative web research technology, which can speed up the process without loss of quality, and indeed can improve the output. It does not matter whether the innovation being tested is an incremental innovation on an existing brand or a completely new concept which is being developed as a totally new brand, speed to market is equally important in both cases. In the rapidly changing market place of today it is vital to stay competitive, so that brand owners can not only innovate and evolve their existing brands, but can also develop new brands. Speed to market is equally important in both cases and we need techniques that will fulfil this need.

The Innovation Process

The Innovation Funnel widely disseminated in Marketing and Advertising is recognised as idealistic in that the process ideally proceeds logically and sequentially from an open creative 'mouth' through systematic development to shipping to the market.

However, in practice it is rarely like this as many Managers will know, and as is well documented in the literature (e.g. Wheelwright and Clark, 1992). Actual Innovation Funnels are often confused, get jammed, are based on chance, subjective to Management influence, etc. (Fig.1):

Fig 1: Actual Development Funnels



Wheelwright and Clark used the above 'psychodrawings' by Executives to illustrate that there can be (left-hand) many conflicting Funnels, where choice is like a random throw of the dice and development is convoluted. On the right, the source of ideas is uncertain, product ideas seem to recirculate, there is a lot of 'heat' at the end, and a few products 'drip out' into the market.

Although consumer research in its current form is an essential input, the form that it takes can also contribute to failure or slowness to market. Much research is tactical in nature and tends to be mechanistic and atomistic. The tendency is:

(1) To deconstruct the mix down to its different elements: the brand name, the label design, the pack, the concept, the advertising, the product performance, taste, colour, perfume etc, etc. The most famous example of this is the 'New Coke' relaunch where blind taste tests were used by Senior Management as the principal research evidence to support the decision to relaunch. In fact, the negative consumer responses when 'New Coke' was launched illustrates that testing one element of the mix in isolation from the overall emotional and functional equity of the brand is not only inadvisable but also potentially misleading.

(2) To test different parts of the mix in sequence and isolation to see whether they meet consumer preference, rather than contributing to the total product and brand positioning. This we believe is not just slow but can also lead to wrong decisions being taken.

Thus not only does this sequential process occupy valuable and expensive Management time but it is also often inappropriate and sometimes misleading to test individual elements out of context of the whole mix. Only when a mix is tested holistically and early on in the innovation process, can true strategic conclusions be drawn.

In practice, much of the focus of this mechanistic type of research is to confirm that the 'right' decisions have been taken to satisfy Process Managers rather than pointing the way forward for development to optimise the potential of an innovation. The 'mechanistic' vs 'organic' metaphor is known to exert a powerful influence on how companies approach their markets and internal priorities (Hanby, 1999). 'Mechanistic' organisations tend to work with mechanistic research procedures, whereas 'Organic' organisations prefer a more holistic approach, integrating quantitative and qualitative approaches in their conceptions of branding, NPD, and advertising, as well as research.

Further, there has always been a problem with major strategic quantitative research projects. Much major mix testing, advertising testing and attitudinal tracking is criticised by marketing managers and advertising agencies alike as lacking sufficient depth to take decisions without having to conduct further time-consuming and costly qualitative research to supplement the results, either in parallel or after individual element work has been done. This also argues for an approach, which combines and integrates qualitative and quantitative approaches into one.

Making Quantitative Research Diagnostic

These weaknesses in conventional research and the flaws in the Funnel Model have led us to examine whether it is possible to combine in depth diagnostics within a quantitative interview by using qualitative projective type questions relying on visual imagery as well as open-ended feedback, i.e. a QualiQuant™ approach:

* This new breed of diagnostic, qualitative/quantitative research can examine a mix holistically and shortcut many of the tactical tests of individual mix elements, thus reducing the lead-times for product development.

* In this way, ideas can be worked up as early as possible into prototypes that can be holistically tested, thereby providing rich diagnostics from which the elements of the mix can be optimised.

Therefore the whole process is accelerated and made more efficient.

These principles can be applied to conventional forms of research where web penetration is low, but the Web in particular provides a unique opportunity to bring a much more qualitative element, to quantitative interviews which therefore provides richer diagnostics than conventional quantitative research. The Internet so far has been used mainly to do conventional research via the new medium. It is the contention of this paper that for the industry to realise fully the value of the Internet we need to recognise the untapped strengths of the medium and re-engineer the way the medium is being used for research. The Internet can also provide very rapid feedback therefore contributing to reducing time to market. Where necessary the Internet provides the opportunity within a total mix test to increase sample sizes to test different mix elements, such as pack alternatives or prices, in separate cells but still in the context of the total mix.

A number of papers, including Taylor (2000) and Wilkie, Adams and Girnius (1999), point out that online research is fundamentally different and changes the way that we can design questionnaires:

* One of the key differences that has so far remained largely unexploited is that experience shows that responses to open-ended questions on the Web are longer, richer and more revealing.

* Another is that the medium is far more visual allowing respondents to see a rich tapestry of images, longer lists of response options and, as bandwidth grows, video images.

For example, Wilkie, Adams and Girnius report close correlations between parallel Bases Tests done in mall intercepts compared with the Internet. However, to their surprise they found that in the Internet sample the absolute level of open-ended responses was higher even though the nature of responses was similar. This was especially true for respondents citing dislikes. They suspect that in the anonymity of their own homes without an interviewer sitting in front of them, respondents are more

willing to voice their dislikes. We have also observed the same effect in our own work on the Web. There is no doubt that there are some respondents who will type in quite lengthy comments in open-ended questions and that this is most pronounced when they have had a bad experience with a brand or service.

Taylor points out that what we are seeing with internet based research is more of a revolution than any other changes we have seen in data collection methods. Although CATI and CAPI were major technological advances at the time they did not fundamentally change the way that we designed questionnaires and collected and analysed data. However, Web interviewing if used to its full potential demands a fundamental reassessment of the way we do all of these things. In particular the Web can capture the unedited voices of respondents, and replies to open-ended questions are richer, longer and more revealing. It is also potentially better at addressing more sensitive issues because respondents are not inhibited by the presence of an interviewer.

The same point is made by Aspinall, Batey and Branthwaite (2000), who hypothesise that the reason the Web is the best medium for exploring sensitive issues is because physical presence is absent online and anonymity is possible. Thus respondents are freer to express their most intimate feelings with less concern for social censure and negative reaction. The success of Internet groups involving social stigmas such as drug and alcohol addiction indicate that it is possible to explore delicate subjects online. Respondents completing Web surveys are potentially more honest and more willing to say things that they would not have said to an interviewer. The more honest and full responses obtained from Web interviews are relatively free of interviewer bias and therefore arguably more valid.

Our own approach has been to completely re-evaluate what is possible in a quantitative interview:

* First, we have worked on a number of different programmes to translate the projective questions that we have used for many years in the group discussion environment into a Web interview environment.

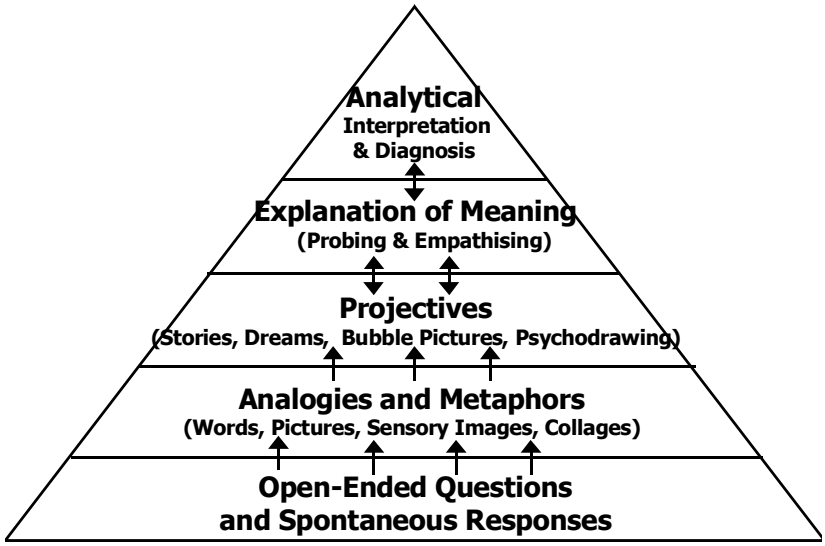
* Second, the playful visual nature of the web environment makes it a more natural situation to apply visual projective questions than the face-to-face environment of an in-home or mall intercept interview, where it is very difficult for even for the most experienced interviewer to handle a large deck of visuals and expose them in a way that makes it easy for the respondent to deal with.

* Third, in the Web environment we can make the exercise relatively simple, but more importantly fun, for respondents to complete. We have been experimenting with a number of question types including picture association, adjectival selection, word association, storytelling, bubble projectives and other projective and elicitation techniques normally found in the qualitative researchers repertoire.

Qualitative Techniques in QualiQuant™ Research

The content of a QualiQuant™ questionnaire contains selections from the following qualitative techniques (Fig.2):

Fig.2: Hierarchy of QiQ™ Qualitative Techniques



* At the base level are spontaneous and open-ended questions, in which we can subject the richer content from Web interviews to a more qualitative style analysis.

* At the next level are analogies and metaphors such as word association, picture selection, etc., which can be used to build visual and verbal collages.

* Beyond this are projective techniques designed to elicit intuitive and unconscious meanings and needs, such as storytelling, guided dreams, bubble pictures, psychodrawings, etc.

* Above these, we then need explanations of the meanings of all that respondents have told us. This is analogous to probing and empathising with respondents, and is partially achieved through the analysis of individual responses. But it can also easily be enriched by rapid follow up interviews by email (sometimes moderated over a series of sessions), or by depth interviews where respondents elaborate their views. In the project case described below, follow-up depth interviews were used to create this kind of empathy.

* Finally at the highest level, we interpret what all of this actually means for the brand or idea being tested. The aim is to provide a diagnostic explanation of how to fine-tune and improve the concept or whatever is being tested.

Using these techniques we have been able to go beyond simple feedback that rates an idea as successful or not because it exceeds or falls below the norm. The diagnosis

provides information on how to optimise different elements of the idea and make it more meaningful and powerful to its target consumers.

e-Commerce Case Study

An example of this QualiQuant™ approach in practice has been conducted by ourselves for an e-commerce client to segment Websites, conducted in the UK using an Internet Panel set up by Global Market Insite, one of a new breed of Application Service Providers to the MR Industry, which enables the licensee to manage an Internet survey from setting quotas and drawing a sample right though to data processing and reporting. The sample size was 2000 respondents.

Our Client's objectives were to go well beyond the rational mapping of functional benefits and to understand how the emotional response to these Websites was shaping people's surfing behaviour. This would then drive future strategy on the Client's Website in terms of communication both in advertising and in fine-tuning the site itself. The diagnostics included measurement of brand image in visual terms, adjectival selection to get at the emotional side of brand image, and psychographics to allow conclusions on brand image engineering and targeting. The imagery of the 'Ideal' Website is shown in Fig 3:

Fig.3: Summary of Ideal Site Imagery

We created this collage for the 'Ideal' site by taking the results of picture association and adjectival selection for the Ideal site and then for each individual Website:

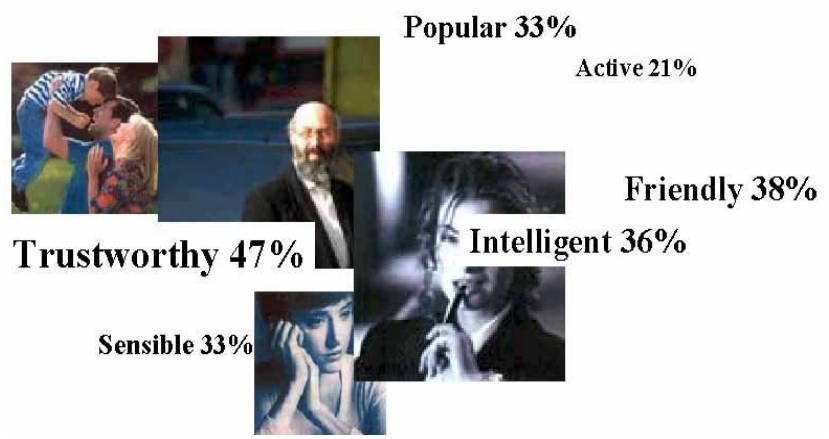
* The shape and structure of the associations was created by multivariate analysis and the size of the pictures indicates their strength of association.

* As can be seen, the Ideal contains a balance of the more 'intelligent' and 'innovative' with the need to be 'trustworthy'. The dimensions of the collage mapped out run from 'extrovert', 'young' and 'populist' at the top to 'intelligent' and 'mature' at the bottom. The horizontal dimension runs from 'individualist' on the right to 'trustworthy' on the left.

* These dimensions are quite close to hypothesised universal dimensions of brand personality which on the vertical axis run from 'expression' at the top to 'repression' at the bottom, and on the horizontal dimension from 'conformism' on the left to 'assertiveness' on the right (Pawle, 2000).

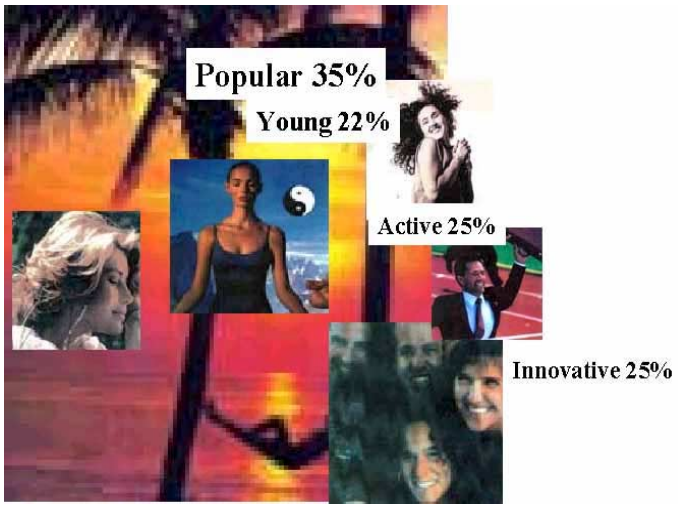
Individual websites proved to have very different images from each other on these dimensions. Thus Website A (Fig.4) shown below was seen as very 'trustworthy' and 'intelligent' and enjoys a very high hit rate and repeat usage level as a result.

Fig.4: Image of Web Site A



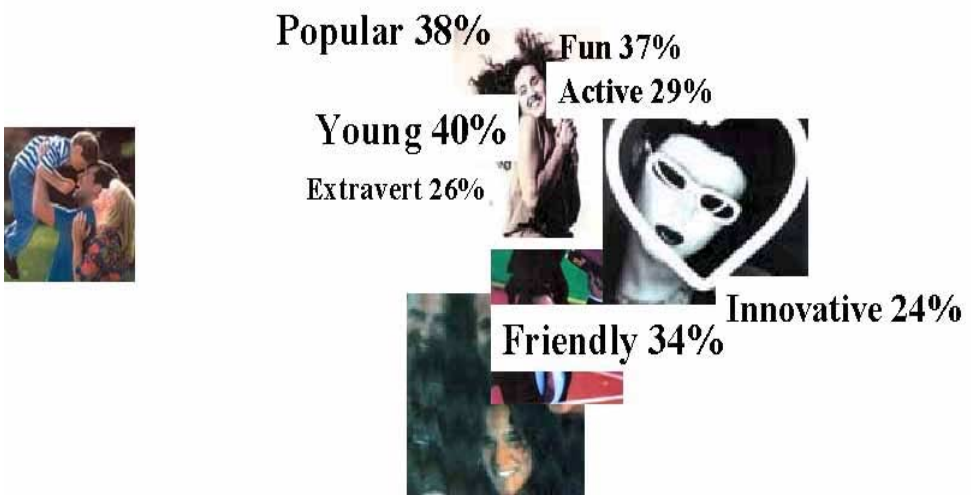
However, Website B (Fig.5) is very 'idyllic' in feel and in the visuals associated with it. It is in fact far less associated with being trustworthy than website A or the Ideal, and suffers from a lower hit rate as a result.

Fig.5: Image of Web Site B



On the other hand, Website C (Fig.6) has a far more 'cool', 'extrovert' and 'experiential' feel to it, but is still not seen as very trustworthy and thus also suffers a lower hit rate.

Fig.6: <u>Image of Web Site C</u>



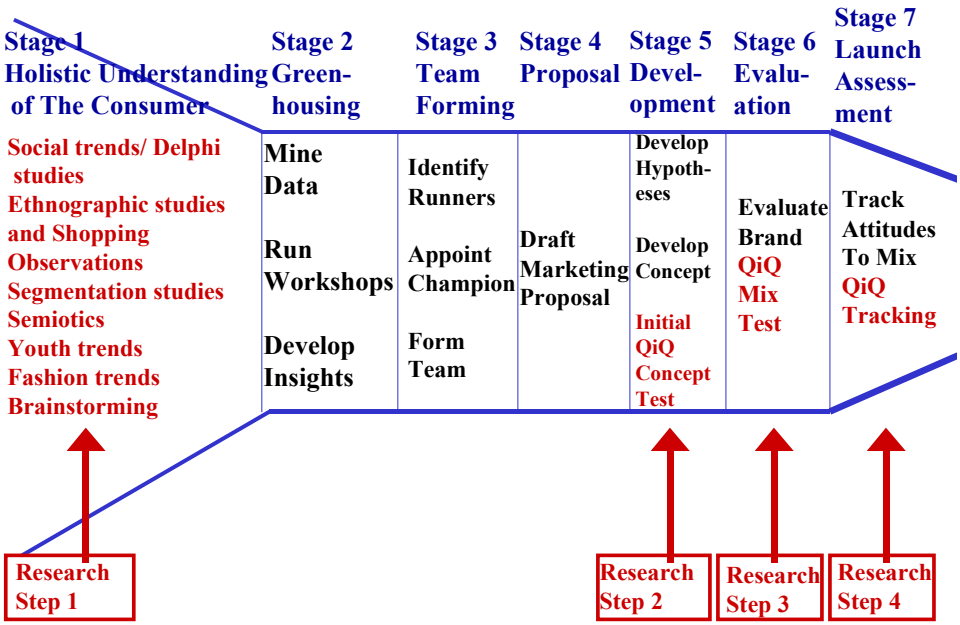
We then created a segmentation of Web users based on their attitudes to using the Web and the need states they associate with Websites. We were then able not only to describe segments in pure quantitative terms but were also able to show from the picture sort and adjectival selection more qualitative associations that we could then relate back to brand image to help in brand positioning. The outcome of all of this was that we were able to draw some highly diagnostic maps, which described the emotional profile of Website Brands, resulting in clear conclusions for Communication Strategy.

Another way to leverage the potentially richer output from more conventional open-ended questions is to subject it to a qualitative style analysis. The application provided by Global Market Insite grades respondents according to how well and thoroughly they answer open-ended questions. This allows us the possibility to both pre-select more vocal respondents for certain types of highly diagnostic (opinion-leader) type surveys, or to exclude respondents who rarely or never answer open-ended questions. All of this can help to improve diagnostics in web surveys.

The Optimum Innovation Funnel

As a result of applying a highly diagnostic approach to testing product ideas via the Internet, we can propose an optimum Innovation Funnel, which short-circuits the length of time involved, and makes it more efficient. The model we use is based upon research input and screening ideas at four definite points during the Funnel process (see Fig 7 below).

Fig.7: Optimum Innovation Process



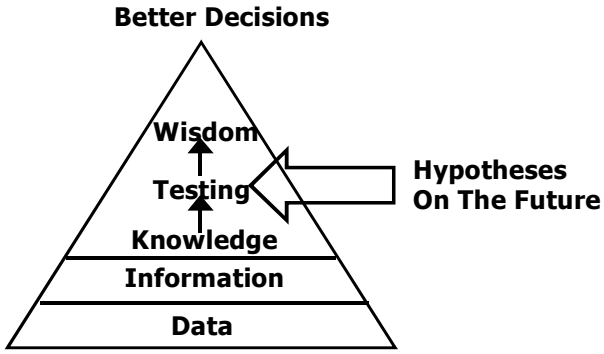
Research Step 1 – Holistic Understanding on The Consumer

To be successful Manufacturers must do substantial strategic research (Delphi Studies, Ethnographic Studies, Segmentation Studies, Semiotics, etc) to get a broad and holistic understanding of consumers future needs before they start working on concepts. Inputs from QualiQuant™ can be equally as valuable here as for testing further down the funnel. The technique is particularly effective for Delphi and Segmentation studies where a deeper qualitative feel is needed to understand what respondents are saying in emotional terms.

Stage 1 is the most important stage in creating a corporate environment in which better decisions will be taken that will have reverberations on Stages 2, 3 and 4 leading ultimately to more successful brands.

Duboff and Spaeth (2000) used the diagram below to illustrate how to turn data into better decisions

Hypotheses Challenge Knowledge (Duboff & Spaeth)



This kind of strategic thinking and use of research is vital at Stage 1 where what we are aiming to do is to turn data into information and knowledge that then creates hypotheses about the future. Holistic Consumer research at Stage 1 should continuously be checking and updating knowledge about consumer needs and values and then testing the hypotheses generated. This will result in a much richer pool of ideas and innovative ideas to put forward into concept testing at research Step 2.

Stage 1 is often where many companies are weakest since they concentrate too much effort on tactical studies which are simple evaluations of mix elements. These kinds of studies do not achieve the broader holistic understanding that will result in more successful innovation which flows from concepts which are based on deeper strategic insights.

The mining of insights is a challenging step. Insight can be defined as seeing behind what consumers are saying at face value and finding a unique need that is not currently being satisfied by competition and that represents an idea with future potential. Thus we need to generate research results at the first stage from studies (such as Delphi) that allow us to generate alternative future scenarios of consumer values and needs. Semiotic studies can provide an understanding of the cultural codes and symbols that colour consumer values. Ethnographic studies are useful too because they go behind the façade of what people say, to what they really do. They can reveal the often unconscious and intuitive steps in product use and brand choice which are often not always accessible via conventional interviewing (Salari, Cooper and Pinijarom 2000).

It is vital that having done the research at Stage 1 and mined insights using creative workshops at Stage 2, that a champion is appointed, and a team formed at Stage 3. Ideas often die because they are not nurtured at the 'greenhousing' stage and nobody is appointed to champion the idea. At Stage 4 a marketing proposal should be written which should clearly state the consumer need and insight upon which the proposal is based.

Research Step 2 – Concept Testing and Refining The Mix

At Stage 5, after nurturing and developing ideas and concepts in Stages 2-4 of the funnel, QualiQuant™ concept testing can be used via the web, and highly diagnostic results can be turned round quickly and economically. This allows rapid screening of concepts but also gives the diagnostics that allow fine-tuning of the mixes selected to go forward. The principal here is:

* That the quantitative measures will give management the confidence to select winners while the qualitative diagnostic input gives the marketing team the data they need to refine the mix.

* Thus prior to the final mix test it can be fine-tuned without the need for atomistic research that deconstructs the mix. This all saves time compared with the conventional approach.

We believe that qualitative research should be used heavily at Stage 1 of the funnel to get a broad holistic understanding of consumer needs, but should not be used to replace judgement in taking decisions about individual elements of the mix at later stages in the funnel. This slows down the innovation process. Qualitative can and should be used as a mix developmental tool early on in the funnel it should not be used to evaluate further down the funnel. While some separate elements of the mix stage such as packaging and product will sometimes need evaluating later on down the funnel they should always be tested in the context of the total branding and can also be tested via the QualiQuant™ web methodology, giving the qualitative feel which often causes Marketing Managers to opt for qualitative research when they should in fact be commissioning quantitative. Leveraging the qualitative element of web interviewing in a quantitative context overcomes this craving that most Marketing Managers have for better diagnostics at this stage.

Up to this stage as much research as possible should have been developmental rather than evaluative. A mistake that many companies make in developing new ideas is to lurch into evaluative research too early on in the funnel. This will not only kill good ideas but will also mean that concepts have not been optimised before they are evaluated. It does not matter how well a poor idea is executed - if it does not fulfil an unmet consumer need it will never be successful. Whenever marketers and researchers are writing action standards they should think hard about whether they are at a developmental stage or a final evaluative stage. The most creative brands and advertising campaigns emerge from a process that doesn't attempt to evaluate an idea until it is fully optimised via developmental and strategically focused research.

Research Step 3 - Mix Testing

Once the mix has been developed and finalised it is vital that it is fully tested for market potential before being launched and again the QualiQuant method can be used here. The advantage at this stage is that although the principal reason behind this test is to check market potential some mixes will not achieve their action standards. If this does happen then the diagnostics provided by QualiQuant will be vital because they will allow us to identify weak areas of the mix and optimise them before retesting.

Research Step 4 - Tracking

The last step is to track the progress of new brands, brand relaunches and brand extensions once they are launched into the marketplace. It is vital in tracking brands that we not only evaluate their functional ratings but that we also check the emotional equity that is often the essence of strong brands. Understanding and tracking core brand values is another area where the qualitative feel provided by QualiQuant methodology can prove valuable to brand owners. In particular it maybe important in tracking to employ projective techniques like metaphor elicitation and storytelling to understand core brand values that cannot be accessed by conventional rating scales. While rating scales are useful they do not go far enough in providing the diagnostics required at this stage of testing.

Conclusions

This programme is aimed at making research more effective in the way we turn knowledge into competitive advantage. We do this by using the Internet in a completely new way to combine qualitative and quantitative research in a single stage of research. The technique allows for a much fuller diagnosis of a mix in one quantitative-qualitative stage of research thus reducing the length of time needed to research a new mix or a relaunch of an existing mix, whether we are talking of incremental or radical innovation. It also provokes a fresh and more effective conception of the classical NPD 'Funnel'.

This in turn assists by shortening product development timescales, which is a key element of competitive advantage in the increasingly time pressured environment of modern business. We have to establish that these techniques work effectively on the web and that results compare with offline studies via parallel studies. A review of the literature and a case history are included below which demonstrate that this is the case.

Appendix: Literature Review

A fundamental question here is how well the Internet performs particularly for concept and mix testing that corresponds with the main decision points in the innovation funnel. So even if we can improve the diagnostics, which will lead to better decision-making, can we establish that the results are valid when compared to conventional research methods?

There is now quite a substantial body of published evidence that online and offline studies can and do in most cases give comparable but not always identical results:

* Wilkie, Adams and Girnius (1999) review the evidence from their large body of parallel testing of Bases Simulated Test Market Monitors online and offline in the US in which they demonstrate that the results are very closely comparable. It is important to point out that they believe that this is because they have recruited their Internet panel to match their mall intercept respondent profile.

* Wynda and Davies (2000) review data from sixty parallel online and offline concept tests in the US which show very close correlation ranging from .89 to .99 for mean, top box and top two box scores for purchase intent, likeability, value and uniqueness.

* Taylor (2000) reviews Harris Interactive data from political polling and from a healthcare dataset which show high comparability on and offline.

* T Mourad (2000) also mentions the political polling work of Harris Interactive that in the 1998 US elections correctly predicted twenty-one of the twenty two (95%) political races they tested, while telephone polls correctly predicted the winner in 94% of cases. In the presidential election this year Harris Interactive was amongst the most accurate of all the US polls.

* Bruzzone and Shellenberg (2000) review a number of different parallel offline and online techniques to compare advertising recognition of Super Bowl commercials and conclude that the results are highly correlated and comparable. Wissing (2000) also compares ad recognition scores for 50 campaigns tested in Sweden by face-to-face and via the Internet. There was a very high correlation between the two different surveys; the correlation is as high as 0.85 which is a similar level to that reported by Bruzzone and Shellenberg in the US.

* Duboff and Spaeth (2000) in their chapter on the Internet review a number of cases.

* Project Landmark shows no consistent or defining differences in attitudes or behaviours between Internet samples and the general population, except that online respondents are more positive towards technology, and more likely to own credit cards as we would expect.

* Quaker Oats compared online and offline methodology for their tracker of awareness, attitudes and usage (AAU) and found both methodologies delivered comparable results in measured levels of brand awareness, ad awareness, liking, purchase intent and attribute ratings were not significantly different but some results did vary. In the online survey unaided brand awareness was less specific probably due to the lack of probing normally used by interviewers. A second area where differences occurred was that although overall levels of ad and brand recognition were similar the face-to-face mall data included more incorrect answers while the on-line data contains more don't knows. The higher levels of don't know is something we have observed in our testing where the option is given. Mourad (2000) also mentions that online surveys may generate more don't knows or not sures because respondents can see these options but points out that follow up questions can be used to reduce this.

* The final case Duboff and Spaeth (2000) review is Discovery Communications who produce educational videotapes in the US targeted to purchasers of these types of titles. This is a bit of a cautionary tale because they conducted a parallel concept testing study of 25 concepts by an offline mail panel and by an online survey via AOL's Opinion Place. To achieve a sample of 400 core purchasers of educational videos by the mail panel 50,000 panellists had to be screened (less than 1% of the universe). On-line the screening procedure seems to have been different i.e. the screening questions were embedded into the "Town Fair Quiz" at Opinion Place. This presumably resulted in a different profile of respondents being recruited via Opinion Place, because the results from the concept test were not comparable, in that the top rated video on the mail panel only rated tenth online. It may have been the case that the core target group do not visit Opinion Place and may have been 'information seeker' type surfers who do not visit these types of commercial websites on a regular basis. This leads us to conclude that it is vital that extra care and attention is given to who is interviewed online to ensure that the online universe is representative enough and that the sampling frame is sound for the purposes for which it is being used. Clearly this is going to be much greater problem where the target is such a small proportion of the universe was it is in the Discovery Communications case.

* The last case we would like to quote here is a 3M case history (Lexcellent, Terradot, and Beale 2000). The research was conducted by NovaTest, who like us, also use the Global Market Insite web application to conduct research on the Internet. 3M were looking to move motivation for consumer purchase of Scotch Tape from being purely functional to being far more emotional. In order to achieve this they wanted to test a new dispenser design in the shape of a teapot

The main objectives of the study were to verify the acceptance of the design of the new Teapot dispenser and validate the new strategic approach in this category of products. The main constraint was that time was short and a decision on investment had to be taken in less than the time needed to conduct a normal face-to-face product concept test. In addition budgets were tight and the test had to be conducted across Europe. NovaTest in view of these constraints proposed an Internet concept test and 3M accepted this recommendation with some misgivings, as they had no experience of

using the web for this type of concept test. Their major concerns were firstly the representativeness of the sample being too male oriented, too educated and too open to new concepts and secondly the fact that Internet penetration in European households varies significantly from one country to the next.

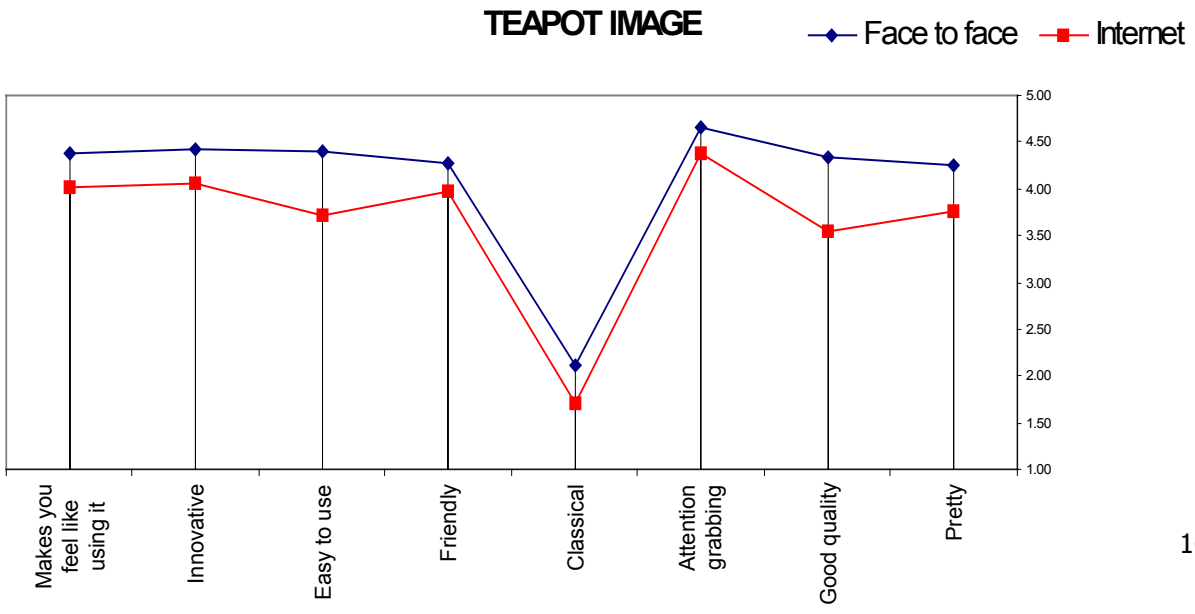
The study went ahead in two phases:

* The 1st phase was an Internet study in five European countries. The results from the first stage were so favourable that 3M felt the need to verify the results.

* The 2nd phase was a verification study via a traditional face-to-face study in France. The Internet study conducted in May 2000 involved 1236 interviews in France, Italy, UK, Germany and Norway. The Global Market Insite Internet panel was used and quotas were set on age, sex and level of education. The ability to set and automatically control quotas is a big advantage on Internet panels, indeed quite complex interlocking quotas can be set using Global Market Insite technology, which could not be easily achieved in conventional face-to-face quota sampling. The method used was monadic sequential.

The Internet study showed that the new dispenser gives more modernity, innovation and relevance to the Scotch® brand. Its performance was similar in all five countries. The new dispenser is clearly preferred when compared to the current dispenser: more than 70% prefer Teapot to the existing dispenser. This all led 3M to question whether these results were too good to be true. They questioned whether the photos were too flattering for the Teapot dispenser and whether Internet users represented legitimate consumers who are not Internet users?

Therefore a second phase 2 study was carried out in France involving 110 monadic interviews with product placement of 10 days. The same quotas were used by age, sex and level of education as were used in the web survey. The objectives here were to check the positive results of the Internet study and to ensure that there was good acceptance of the product after use (to determine the ability of Teapot to satisfy the expectations of the consumers and prevent disappointment). The result was that the performance of Teapot was if anything even better in the face-to-face interview, with a sample that is more representative of the French population. The results on key image attributes are shown below:



The answers to open ended questions were richer on the Internet than in individual interviews: responses were more sincere, personal and complex which supports our contention that we should develop this area in future concept testing to make it more diagnostic. Consumers have common sense: as long as they do not have an idea of the product that is clear enough, they do not commit on purchase intent and in this study as discussed earlier there was a higher proportion of 'do not know yet' in the Internet study than in the face-to-face study. 3M are now convinced that the Internet is probably the best tool in the field of product concept market studies, to meet the constraints imposed by a European organisation for the majority of studies. They are also working on applying the Internet tool to a U&A study of office automation.

It is clear from the evidence (see Appendix) that comparable results are being achieved from web surveys in many areas including mix and product concept tests. However it is also clear that the web is a different research medium that brings its own challenges and opportunities. We should not simply transfer existing questionnaires directly onto the web but we should reinvent the way we ask and present questions for the medium. Thus we will get potentially richer results particularly from more visual, projective and open-ended questions. We also must go into each new web survey with our eyes wide open on the issues of representativeness.

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Note: - we would like to acknowledge the help of Dr. Alan Branthwaite who provided invaluable advise in writing this article.