



An interactive newsletter on Internet-based market research.

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Information, Knowledge and Insight

Dear Colleague,

The key to staying on top is staying informed. Clients, colleagues and suppliers require your insight and professional knowledge of the market research industry and where it is headed. To remain competitive, the key is to listen and learn and observe and learn; gather and synthesize information; interpret how changes in the marketplace, technology and economy will affect how you serve your clients.

We are pleased to be a clearinghouse of informed insights and wisdom that will contribute to your success. As a continued service to our valued clients, we offer this newsletter as a source of information on new developments and methods. In this issue, we focus the Specialty Spotlight, page 2, on our international panel highlighting its broad reach and the benefits you can now leverage for your clients who need to conduct reliable, efficient online research in Europe. Turn to page 3 for our perspective on response rates.

We hope you find reading this newsletter helpful in keeping you current and competitive.

Sincerely,

Lorraine Williams
Vice President

◆ EDITOR ◆

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Did you know that...?

Global Internet penetration is rapidly increasing. Penetration includes email use and is defined as access from home, work or some other location at least once in the last 30 days.

High Penetration (35% or more)
Australia
Belgium
Canada
Denmark
Finland
France
Italy
Germany
Sweden
Netherlands
Norway
U.S.A.
United Kingdom
Medium Penetration (20 to 34%)
Czech Republic
Estonia
Ireland
Slovak Republic
Spain
Turkey
Low Penetration (19% or less)
Hungary
Latvia
Lithuania
Mexico
Poland
Romania
Serbia
Ukraine

Source: Multiple Organizations

Specialty Panel Spotlight



Pan-European Online Panel

The old story was that credible online research in Europe was not possible and researchers were faced with limited alternatives to collect data. Most of the choices available to date have been costly and time-consuming. The new story is that effective online research in Europe is not only a possibility, it is a reality.

Our clients in a variety of industries and across different respondent segments have had an unmet need to conduct European research for years. There are three key components to conducting credible online research, regardless of where the respondents reside: the technology to program and host simple and complex surveys in multiple languages, the methodology to sample appropriately and correct for any bias, and a large-enough representative panel of cooperative respondents to be surveyed.

With rapidly increasing penetration rates and through the recent acquisition of French research firm Novatris, Harris Interactive is now able to offer its research clients a comprehensive European panel. The addition of the one million Novatris panel members to the current Harris Interactive European panel of 700,000 will create a combined online permissive panel of 1.7 million members, believed to be the largest in Europe.

Benefits of this panel:

- The ability to program in multiple languages
- Respondent convenience to take the survey in their language of choice
- Specialty subpanels including: Affluent, Tech Buyers, Auto Owners, Chronic Illnesses
- Reduce costly labor expenses
- A local presence with in-depth knowledge of the European research market
- Conduct large scale and low incidence research more efficiently

Country	Panel Reach 2/2004	Projected Panel Reach 6/2004	Projected Panel Reach 6/2005	Projected Panel Reach 6/2006
Belgium	77,034	94,127	137,135	180,143
France	619,873	715,946	981,398	1,246,850
Germany	169,283	207,560	378,596	549,632
Italy	231,482	259,985	346,505	433,025
Spain	136,598	153,801	198,513	243,225
United Kingdom	250,004	301,510	464,278	627,046
All Other*	55,306	65,777	95,549	125,321
Europe Total	1,539,580	1,798,706	2,601,974	3,405,242

* Includes Austria, Denmark, Finland, Greece, Netherlands, Norway, Sweden and Switzerland

For more information please feel free to contact Merrill Dubrow at mdubrow@harrisinteractive.com or call 1.978.409.2525.

Where to Find Us

Look for our team at these upcoming conferences and events. We'll be looking for you too.

Event	6th Annual Market Research Association (MRA): NY/NE & Philadelphia Spring Event 2004
Date	April 1-2, 2004
Location	Park Hyatt Bellevue Hotel, Philadelphia, PA
Register	http://www.mra-net.org/chapters/philadelphia.htm
Event	The 50th Annual Advertising Research Foundation Convention and Trade Show
Date	April 26-28, 2004
Location	New York Marriott Marquis, New York, NY
Register	https://www.regisys.com/arf04/RegiCheck.asp
Event	Market Research Association (MRA) 46th Annual National Conference-NY/Philadelphia
Date	June 9-11, 2004
Location	The Sheraton Boston, Boston, MA
Register	http://www.mra-net.org/ecom/special_events/2004Annual/index.cfm

Helping You Help Your Client

What Drives Online Response Rates?

By Paul Kirch

Director, Client Development, Harris Interactive Service Bureau

How are age and gender correlated with response rates? What kind of impact does one's salary have on willingness to participate in surveys online? These are examples of the types of questions you need to be asking if you're conducting research on the Internet. By knowing how age and gender, or other demographic factors such as income, can influence survey participation and response rates, you can more accurately predict the amount of sample needed – which can also determine field time and cost.

Currently, more than two-thirds 67% of the U.S. population uses the Internet (source: *The Harris Poll*®, December 2002). In most cases, with the exceptions of the elderly and those with very low incomes, we find that demographic distributions closely mirror U.S. Census data (source: 2003 U.S. Census) about online users. This representation is increasingly important to the success of online research. As the potential audience grows, so does the responsibility to understand the factors that affect how these people respond to online survey invitations. Understanding the respondents' online usage is not where our responsibilities stop. As an industry, it is important that we continue to address sampling practices that may be considered spamming (junk mail). With spam filters currently being used and anti-spam laws looming, the true advantage is for the client who has a list of loyal customers or the Internet data collection provider who has taken time to get to know its panel members. Betrayal of respondents' trust will lead to very few second chances.

When shifting focus to online research, it is critical to understand what can and cannot be accomplished online and how various design characteristics influence respondents. To get to know our panelists better, Harris Interactive has conducted numerous studies and invested considerable financial resources in research-on-research projects (ie invitation design, subject line experiments, scale experiments). Using the results of these studies, we are able to predict more accurately how our panel will respond to requests for participation in the majority of projects. Utilizing differential response rate data, such as knowing that what degree males 18 to 24 respond at a lower rate than females, or knowing that female respondents tend to be early responders, we can tailor the invitations and start dates and build this into the email invitation distribution plan to provide the most representative data possible.

By getting to know your online respondents and how they are likely to react, your chances of success increase greatly. Without this knowledge, it is hard to predict accurately the field time, amount of sample needed to complete the study or even the representativeness of your data. Most importantly, it becomes increasingly difficult to control the cost of your study. Success online doesn't have to be challenging if you ask the right questions and take the steps necessary to understand your audience.

Often I've heard it said that knowledge is power. I say true power lies in what we do with that knowledge.

Please send any comments or questions to pkirch@harrisinteractive.com



Awards and Achievements



Mary Zsomboky

Client Service Manager

Presented Service Bureau Quarter 2 Award for client service manager excellence

Anne Nealon

Client Service Manager

Presented Service Bureau Quarter 2 Award for client satisfaction

Jen Deuel

Senior Client Service Manager

Presented Service Bureau Quarter 2 Award for most valuable player



Celebrations

Observing birthdays

Karen SomervilleApril 1

Jill PetersonApril 19

Jennifer DeuelMay 6

Aileen HenningMay 9

Susan SchenkelMay 10

Merrill DubrowMay 23

Jim Bonham.....June 4

Lorraine Williams.....June 12

Engagements

Anne Nealon

Promotions

Anne Nealon
to Senior Client Service Manager

Fast Factoids

More than one third of Internet users now have broadband connections. Less than two years ago, only 22% of adults online had broadband (including ISDN, cable, ADSL/DSC, T1, T3 lines) connections. Now 37% of U.S. adults who are online report having broadband access.

“What type of Internet connection do you have for your home computer or other primary computer?”

Base: U.S. adults online

	Feb./March 2002	Nov./Dec. 2002	Oct./Dec. 2003
	%	%	%
14.4k modem	1	2	2
28.8k modem	4	5	4
33.6k modem	2	2	2
56k modem	39	29	20
ISDN line	1	1	1
Cable modem	13	14	21
ADSL/DSL	7	11	14
T1 or T3 line	1	1	2
Other	4	6	6
Not sure	27	27	25
Decline to answer	1	2	2
TOTAL BROADBAND*	22%	27%	37%

* Includes ISDN, cable, ADSL/DSL, T1 or T3 lines

Source: *The Harris Poll*® – January 14, 2004 (phone survey conducted November and December 2003)

Looking Ahead

Is there a topic or question you would like to see addressed in a future issue? If so, please contact our editor by sending your insights and comments to Advance_News@harrisinteractive.net

Contact Us

You received this newsletter because you provided your contact information to a member of our client development team. If you would prefer to be taken off our distribution list, please send an email to Advance_News@harrisinteractive.net and write the word "UNSUBSCRIBE" in the subject line.

If you know of others who are interested in receiving our information, please have them forward their email addresses to Advance_News@harrisinteractive.net

Profiles

What Does Customer Service Mean?



Anne Nealon

Senior Client Service Manager

"...always putting the client/customer first. The minute one begins taking a client for granted is the minute client satisfaction decreases. Treat each client as if they are the one and only client you have – otherwise, someday they may be!"

Jill Peterson

Team Leader



"...going above and beyond to make a project a success."



Chris Biviano

Client Service Manager

"...being compassionate, creative and pro-active while exceeding client expectations from the beginning to the end of the project."

Megan Fettinger

Client Service Manager



"A client is the most important part of our business. If they're not happy, we're not doing our job right."