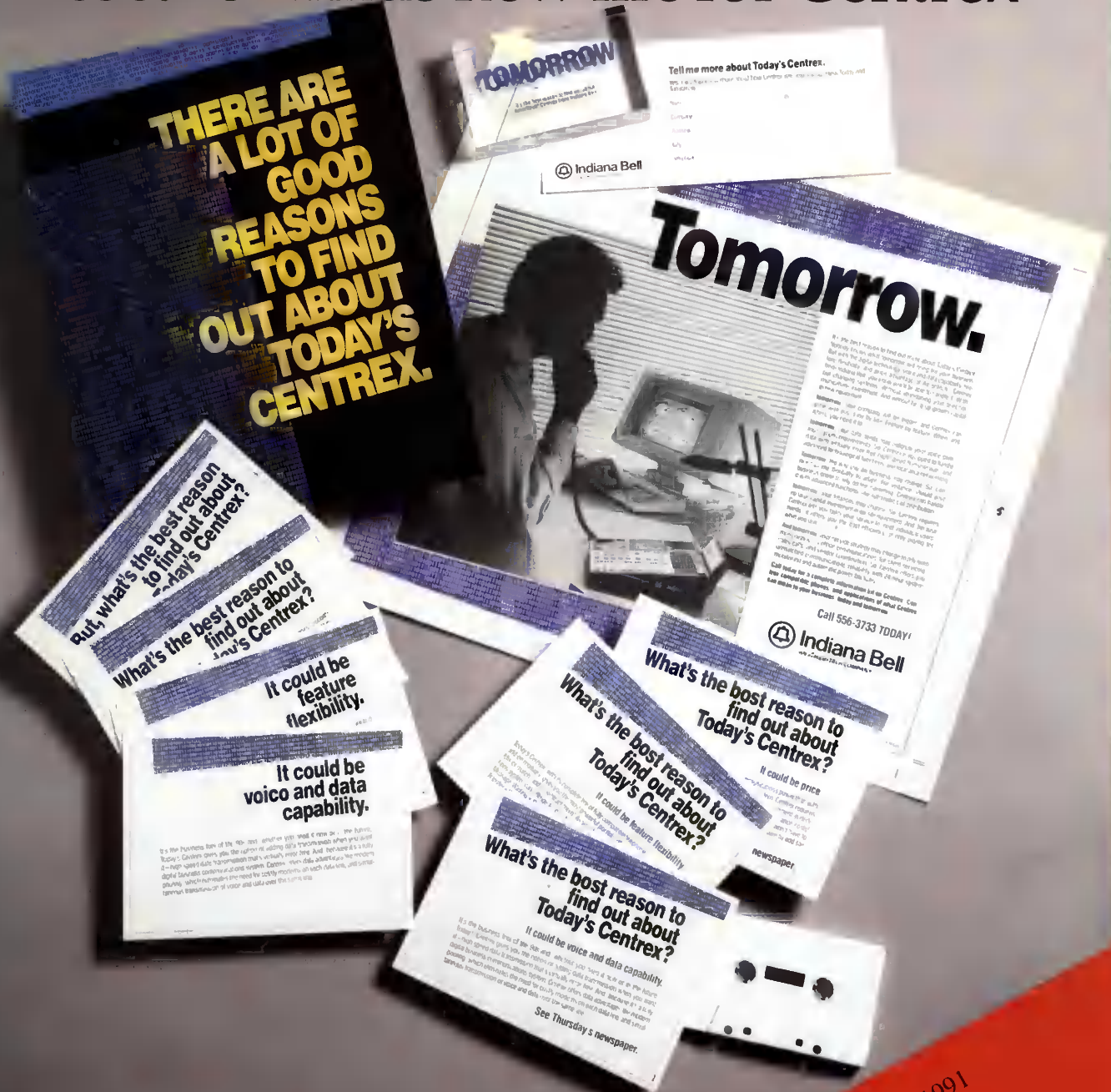


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Business-to-business issue

April, 1991

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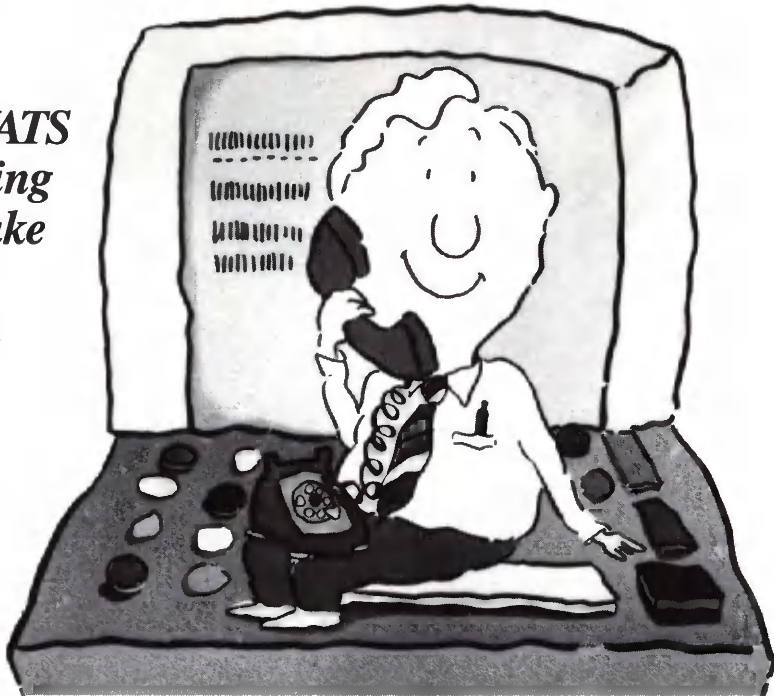
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Cover
Research and marketing teamed up to breathe new life into Centrex. Photo courtesy of Handley Miller Advertising.



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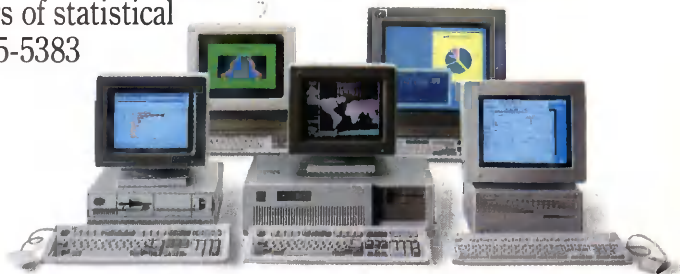
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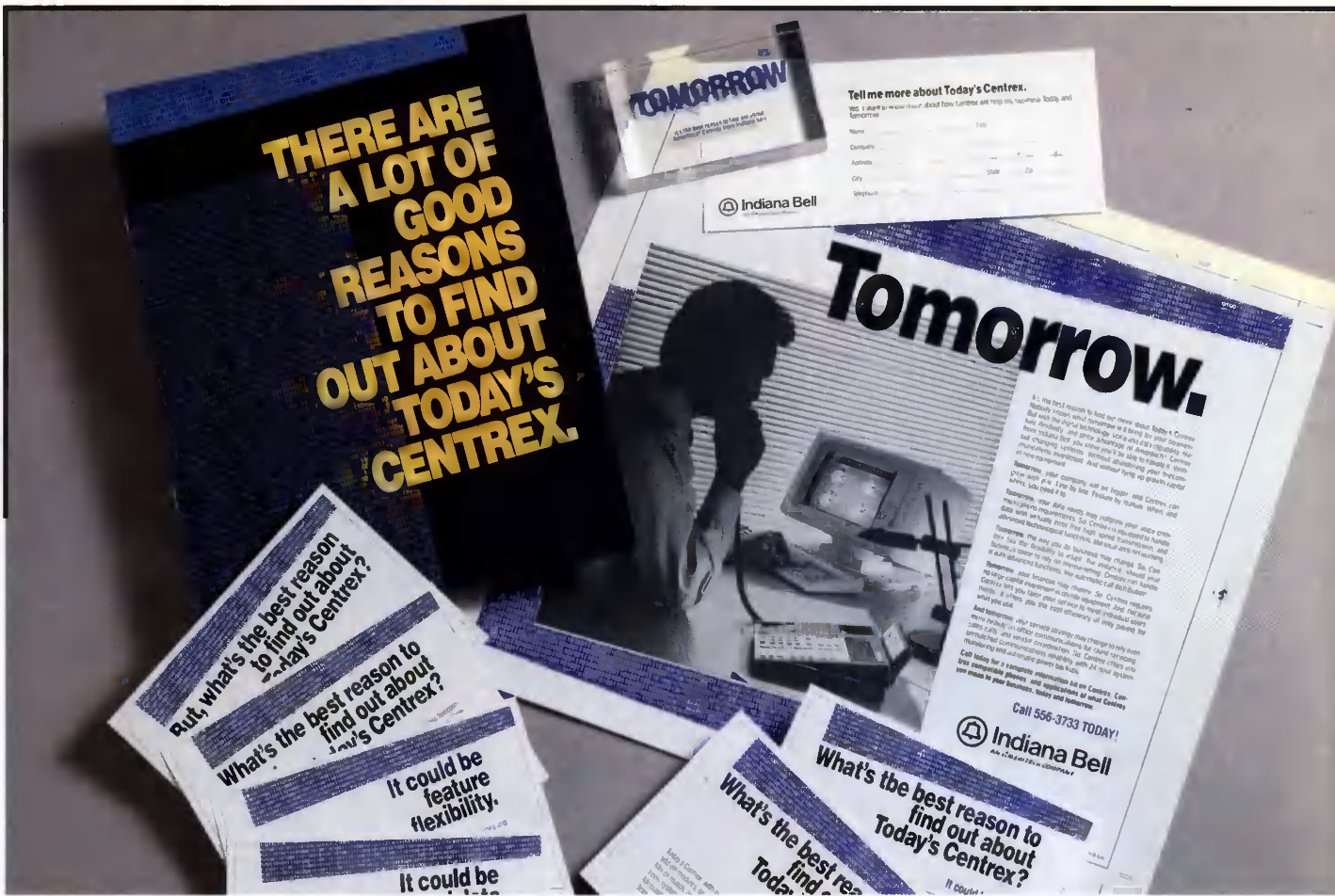
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Back to the future for Centrex

Research and marketing breathe new life into a mature product

One of the most durable and appealing themes in literature is the “comeback kid,” somebody who returns to the playing field late in the game and, against the odds, succeeds. For marketers, the equivalent success story is taking a mature product, one which everyone had predicted was in decline, and breathing new life into it.

Even so, it still comes as a surprise when everything goes exactly like it says in the textbooks:

- when research is instrumental in defining the market and in helping to target the audience more effectively;
- when investments in market intelligence pay off as they are supposed to;
- when it can be conclusively demon-

strated that direct response and measured media produce directly attributable superior results; and

- when market share and positive perceptions are directly, dramatically and positively enhanced by an integrated effort.

Indiana Bell's repositioning of Ameritech Centrex represents such a case study.

Centrex?

Though you may not have realized it, when you've “dialed nine for an outside line,” chances are you've used Centrex. Analog Centrex is a telecommunications system for businesses, first introduced back in 1958. At the time, it was a revolu-

tionary tool that enabled medium to large organizations to “link up” all of their offices on their own “system within a system.”

With Centrex, the “switchboard” was integrated into the telephone company's central (switching) office. With Centrex, you could dial another office in the system without dialing the whole number. Calls could be forwarded. Calls on one telephone could be picked up from another phone even if they didn't share the same line. These and many other features were made possible by Centrex's central office technology.

By the 1970s and early 1980s, however, AT&T and other telephone companies were moving away from central of-

office-based equipment. Business decisions led them to emphasize the sales of on-premise equipment, notably private branch exchanges (PBXs). Centrex technology lagged behind that of PBX capabilities.

By the time AT&T was broken up in the mid-1980s, Analog Centrex was a mature product, and well on the way to being a declining product. In effect, AT&T was granted an "exclusive" right to sell equipment. The regional operating companies were prohibited from directly selling the equipment needed to provide PBX systems to business customers. Their fear was that, without a competitive product to sell, they would be reduced to selling "lines"—in effect, access to the local telephone network—rather than value-added products and services.

Confused by divestiture

Research showed that medium and small businesses were confused by the divestiture of AT&T. They wanted "one-stop shopping" for their telecommunications services, and in many cases felt comfortable dealing with their local Bell company. They also wanted a personal contact, a "take-charge" person.

Indiana Bell, one of the five operating companies for Midwest-based Ameritech, was particularly aggressive in exploring new ways to market products and services to small businesses. An early innovation was Indiana Bell's decision to allow business services to be marketed through a network of telecommunications agents. This allowed a "rebundling" of products. It enabled customers to pare down the number of vendors while still having the comfort of doing business with a familiar name—Indiana Bell.

This was particularly important when it came to maintaining business relationships with small-to-medium sized companies. As with most marketers of business-to-business products and services, Indiana Bell recognized that most of the growth in telecommunications needs would come from small businesses.

Wrenching reorganization



From left, Jim Talhelm, Scott Christie, and Bob Clark

For example, in the Midwest in the 1980s, many larger companies had gone through wrenching reorganization in order to retain their competitiveness. With larger organizations going through "downsizing" or "rightsizing," those who sold to business had to develop new markets.

Meanwhile, introduction of digital technology allowed Centrex to catch up with and even leapfrog PBX technology. With digital Centrex, the operating companies could offer greatly enhanced calling features, data-handling capabilities and even simultaneous voice/video/data transmission.

The only problem was that for one segment of the market, Centrex was viewed as limited, at best, and obsolete, at worst. The other segment of the market was largely unfamiliar either with Centrex or its capabilities. Quantitative and qualitative research had been used to define the characteristics of the decision makers Indiana Bell wanted to reach. These attitudes first turned up in a large quantitative study designed to assess perceptions of Indiana Bell. The study also proved valuable in segmenting the business market.

Respondents were segmented by number of lines and other criteria using product data available from the company's master customer records database. They

were asked to describe their expectations and the outlook for their companies in a series of open-ended questions. They were also asked to respond to a series of self-concept measures.

The smallest companies, those with fewer than three incoming lines, were excluded from the target segment Indiana Bell identified. Once this was done, the small business market which remained was examined. Members of this segment were very different both in self-concept and in their expectations of future performance for their companies.

Entrepreneurial spirit

Many of the businesses Indiana Bell wanted to reach were managed by their founders/owners; in other cases, they were not. In most cases however, the managers shared an enthusiasm and

an entrepreneurial spirit. "They are confident. They are forward-looking. When we were developing our marketing strategy in late 1989-90, most economists were predicting a recession. Our prospects remained confident in the future," notes Jim Talhelm, who was then Centrex business manager for Indiana Bell.

"We needed an advertising strategy that reflected that forward thinking and that optimism for the future," adds Bob Clark, Indiana Bell's manager, business advertising. "We wanted to break down obsolete attitudes where they existed, develop a unifying theme and reposition the product."

"We had a good idea where we wanted to go, from a creative standpoint," says Scott Christie, senior account executive for Indiana Bell's advertising agency, Handley Miller. "We focused on the idea that 'tomorrow is the best reason to learn about today's Centrex.'"

"We adopted a high-tech look and used spot color in newspaper and other print applications. Focus group research helped us to fine-tune the theme, graphics and tactics prior to introducing the program," he adds.

Respondents selected for the focus groups met the product use profile which had been previously established. Creative executions were developed and re-

continued on p. 51

Developing Affinity

Research instrumental in creating system for measuring reader feelings about business-to-business publications

by Joseph Rydholm/managing editor

It's no secret that consumers are quite fond of certain brands of products they use. That's what brand loyalty is all about. But can people feel warmly toward a trade magazine?

They can and they do, according to the people at Cahners Publications and Simmons Market Research Bureau. Cahners, a publisher of numerous trade/business-to-business magazines, teamed up with Simmons to develop the Affinity Index, a method of measuring the intensity of the relationship readers have with the publications that serve their respective industries.

If you're like most people, chances are you come in contact with several business-related publications. Some are targeted specifically to your job and/or industry; others are more general in nature. And chances are one or more of those magazines is more valuable to you than the others. It could be for the industry news, the features, a favorite columnist, or the ads that keep you up to date on new products—for whatever reason, you like the magazine.

Step beyond

By quantifying reader feelings, the Affinity Index lets publications go a step beyond the usual methods of explaining their readership to advertisers: circulation numbers and/or demographics. These measures show who gets the magazine and what job they have, for example, but

they don't show how the readers feel about the magazine, says Martin Fleming, vice president, planning and research, Cahners Publishing.

"Affinity is based on the notion that measuring the size of an audience by use of a circulation statement or readership studies provides only one dimension of



what it is a publication provides an advertiser. What's equally important is the relationship that audience has with the publication.

"In the past, most research has focused on quantity—that is, the number of readers, the size of the audience—and we think this is the first systematic attempt to measure reader's attitudes towards the publication. The hypothesis is that the stronger the feelings that an audience has towards a publication, the greater will be the flow of information from the publication to the reader, both the editorial and the advertising."

Determining the strength of that flow of information can help with a magazine's strategic planning, advertising efforts, and

other marketing tasks, he says.

Similar research

Taking its cue from similar research done in the 1950s in Germany by Gruner + Jahr AG, a publisher of several consumer magazines, the Affinity Index is based on the idea that the relationship between a reader and a publication is multi-dimensional; readers like or dislike a publication for a number of reasons.

Measuring reader feelings has been done on an informal basis in the U.S., but it hasn't been standardized, Fleming says.

"Advertisers and publishers have long believed that readers' attitudes towards some publications are stronger than readers' attitudes towards others, but we really don't know how to measure that, and that's what we have succeeded in doing."

The system can quantify affinity by measuring reader responses to 16 statements that encompass the various aspects of affinity. Sample statements include:

- I save issues of this magazine for future reference.
- Often mark up, tear out or take notes on articles in this magazine.
- It helps me locate new suppliers.
- Helps me keep up with trends in my profession/industry.
- The articles in this magazine are fun to read.

The statements fall into three broad categories:

1. Product Information. Does the pub-

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lication, both in its editorial and its advertising, provide useful information about new or updated products?

2. Community of Interest. Does the publication help the reader to feel part of an industry and maintain a connection with others in their profession?

3. Usefulness. Does the publication help the reader do his or her job better and provide a source of reference?

Sixteen items

For an Affinity survey, reader responses to the 16 items are weighted together to form an index with an average value of 100, a minimum of 0, and maximum of 200. "Gruner + Jahr recognized that there is no one thing that constitutes affinity towards a publication. What the Affinity model does is assign weights to each item measured that bring it in line with what we know to be affinity," says Andy Yaffee, vice president, Custom Media Studies division, Simmons Market Research.

To determine a magazine's Affinity Index, questionnaires are mailed to a sampling of its readers. The three part questionnaires don't indicate who is sponsoring the research.

The first section of the survey is the affinity measurement portion. Here, respondents indicate their level of agreement with the Affinity Index statements. The second asks about readership of the publication, for example, "How many of the past four issues have you read?" These

questions are included because one of the basic notions behind affinity is that it is a measure of reader involvement, Yaffee says.

"So we ask the number of the past four issues read, and even if someone answers the affinity variables for a publication, if we find out later that they haven't read any of the last four issues, we don't count their responses towards the score."

The third section gathers demographic information.

Market segments

Publications receive an overall Affinity Index score and a breakdown by different market segments. For example, publications typically look at readers in large companies versus small companies, or top executives versus other management, or at people working in different aspects of the same field, Yaffee says.

"One of the most important aspects of

Affinity is that you can generate different scores for different segments of your audience, so you not only describe your total audience in terms of their affinity towards the publications they read but you can also describe different segments of your total audience. That can be the most profitable piece of the research from a strategic planning point of view because you may find that overall you do well, but that among one or two particular segments of your audience you do significantly worse than average or better than average."

Two years of research

To develop the system, Simmons conducted two years of background research with nearly 10,000 readers of business-to-business publications. Focus groups were held across the country with readers

continued on p. 32

Retooling the focus group to business-to-business research

by Daniel Oromaner

Editor's note: Daniel Oromaner is president of the Qualitative Difference, Inc., Port Washington, New York. This article was adapted from a presentation made before last year's ARF Conference.

Although more companies are conducting business-to-business focus groups each year, many have found the consumer group model cannot be directly applied to industrial work. The unique circumstances of business-to-business research call for different methods and procedures.

There are five key areas of difference between industrial and consumer qualitative research projects: specialized recruitment, limited populations, confidentiality, subject matter expertise, and dominant group members.

Specialized recruitment

Although most focus group facilities are located in suburban areas—where they are convenient for consumers to visit from home or on their way home—most industrial research projects are easier to recruit from a downtown facility. In downtown areas there is a higher concentration of businesses, and more opportunities to recruit early morning, lunch time, and evening groups. In addition, some metropolitan areas have higher concentrations of certain industries—i.e., advertising or media in New York, computer-related in Silicon Valley. In selecting a city, you should generally pick a location where you will find the largest selection of qualified respondents.

Once the city has been chosen, the focus group facility/recruiter must be selected. Since consumer research still dominates in most markets, care must be taken to select a facility that has extensive experience in business-to-business research. Industrial recruiters must understand business decision-making, organizational reporting relationships, and how to get through secretaries to reach the right person.

Business-to-business recruiters must also recognize that respondent specifications are critical and non-negotiable. Generally, there is no such thing as someone who is “close” to the specifications in industrial research. Either they are the decision maker or they are not, either they use a spread sheet program or they don't, either they understand “full duplex transmission,” or it is out of their realm of expertise.

Good business-to-business recruiters must also know how to get the qualified people TO SHOW. Consumers generally come to groups for the money and the opportunity to get out of the house and meet some new people. Business people come to focus groups to learn something from their peers, to have their egos stroked, to discover a new product or service that their competitors don't know about yet, to have an impact on the marketplace, AND for the money.

Industrial research is also different because sometimes recruiters must reveal the name of the client's company or the type of client sponsoring the research in order to successfully recruit the right people. Owners of quick printing fran-

chises will come to groups sponsored by a copier manufacturer, but they probably won't come to groups sponsored by a competing franchiser.

Business people often want to know what they will be talking about in the group, who will be there, and (often) who is sponsoring the research. They LOVE to learn new developments in their field, and to hear the experiences of their peers. They also appreciate the opportunity to network with those who are in positions to help their business or their career. All of these factors can be mentioned during the recruiting interview to encourage reluctant respondents.

Sensitivity to the needs and lifestyle of busy managers, executives, and owners is also required. Sometimes lunch or breakfast groups are advised, or short, in-depth interviews during the work day. Recruiters must know when these are appropriate alternatives to the standard 6 p.m. and 8 p.m. focus groups.

Limited pool of respondents

When conducting research with some types of respondents (i.e., MIS directors, telecommunications managers), their limited numbers and the sheer quantity of research conducted may require you to accept respondents who have participated in other focus groups within the past year, six months, or even 90 days. In some industrial categories, if there are any “virgin” respondents left, it is only because they NEVER have and NEVER will attend a focus group!

Sometimes you personally must re-

continued on p. 33

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Computers know “how” but they don’t know “what”

by Gary M. Mullet

Gary M. Mullet, Ph.D., is president, Gary Mullet Associates, Inc., a consulting and statistical data processing firm in suburban Atlanta, Georgia. The author wishes to acknowledge Paul M. Gurwitz, whose article in the February 1991 issue of this publication treated related issues.

Recently I tried to convince a statistical software package that when I typed “variable” I meant “variable”. The software, however, used what I said and ignored what I meant to say. Shortly after that I ran across a headline for some new statistical software which blared, “For people who aren’t statistics experts.” I’m not sure that one necessarily has to be a statistical expert to properly use statistical software, but as long as computers and their programs do exactly what they’re told to do, instead of what they *should* have been told to do, oversimplification of software use can lead to trouble. Many times the difficulty is as easy to spot as the “variable-variable” one. Many times it’s not, as will be seen below.

None of the instances which follow are meant to deride or belittle anyone. Instead, they are shown to illustrate just how easy it is to push the wrong button and ask for the wrong analysis. I *still* type “variable” at least half the time, inadvertently and incorrectly. My error brings the analysis to a screeching halt and is easy to find. These examples are both more subtle and potentially more serious.

Examples

At least one data tabulation package does a t-test for proportions or says it does. Generally, for large enough samples (whatever that may be--and for proportions it’s not necessarily anything greater than 30) the results will agree quite closely with the more correct Z-test or χ^2 -test. However, there are some fairly strong assumptions underlying the t-test. Even though these assumptions may sometimes be violated with impunity, strictly speaking there is no such animal as a t-test for proportions. The program in question, however, is simple to

use and incorrect analyses can be performed without question. While a “statistical expert” is probably not necessary to tell you whether or not your particular analyses are all right to report, someone with at least a modicum of knowledge could certainly help. The easy-to-use software can get an unwary analyst into serious difficulty.

While we’re at it, you should be aware that the assumptions behind the above mentioned Z-test and/or χ^2 -test are also quite stringent. For some of your analyses they, too, may be violated--and the computer package used might not flag the violation. It happens a lot in practice, because the programs do exactly as they are told, whether or not you really should have meant to tell it to do such an analysis. (If you do find cases where these tests shouldn’t be done on your proportions, you’re probably stuck either doing an exact test or an arcsin transformation.)

Another variation on this theme is the analysis which was done on a simple paired-product preference. How was it decided whether or not the proportion who preferred product A was different than that preferring B? A dependent or paired t-test. Why? The computer certified the methodology by performing the requested analysis. Quick, simple, easy-to-use and wrong. But at least the analysis was done without the use of a “statistics expert”.

Computer programs that don’t require a “statistics expert” may be useful in designing conjoint studies. Just push the right button (usually ENTER or RETURN), and here come your conjoint scenarios ready to print and send to the field. Again, at least in a few cases, the easy-to-use computer programs have been the source of trouble. In one, a 32-card sort was produced for a study in which one of the attributes had 5-levels. With the other attributes at 2-, 3-, and 4-levels, the design was not a desired orthogonal array--but was unknowingly used anyway.

Another conjoint study was designed for respondents to sort 16 cards. The problem here was that one combination of two of the attributes didn’t vary together. The pairs of levels were constant. To illustrate, if one of the attributes was color with

two levels, say, red and blue and the other was size, say, large and small, what the respondents saw was red-large on 8 cards and blue-small on the other eight. Clearly, there is no way to generate the utility estimates that were desired, but no one thought to question or check the computer generated design before the study was actually completed. The computer program which did the design (and it was written especially for this study) performed exactly as instructed, not as it *should* have been instructed.

A cluster analysis was run on one of the easier-to-use, among the easy-to-use, cluster programs. The program ran exactly as told, but after a couple of iterations, clusters of size 1 or 2 popped up. What happened? Seems that for a handful of respondents, some, but not all, of their answers were punched one card column to the right of where they should have been. These respondents, then, were showing up as the small clusters since they were, in fact, very different from everyone else. The user of the cluster program had no idea whether or not the cluster made sense; after all, there were no error messages displayed.

Another computer program was designed to generate mailing labels from a data base. Just tell it how many you need and names are selected at random and mailing labels produced. In this particular case the computer generated labels weren't even given a cursory glance--after all the computer printed them--but just stuck on the envelopes and dropped into the mail. The only problem was that, while the name, city, state, and ZIP code were on each label, the street and number were not. Lots of undelivered surveys were returned to the sponsoring organization, with the obvious disastrous consequences to the study.

In yet another case, a computer program did an analysis which was really unnecessary. A series of statements were collected on a scale where 1 = Yes, the statement applies and 0 = No, the statement doesn't apply. No problem so far. What the computer was asked to do, and did, was produce correlations between these statements and the same set of statements recorded as 1 = No, statement doesn't apply and 1 = Yes, statement applies. The computer was all too happy to compute these unnecessary correlations, at no small cost. They could be done, therefore they were done.

Yet another frequent happening (mentioned by Gurwitz) is to request the computer to run a discriminant or regression or factor analysis. Quick and easy, if it weren't for item non-response. Most computer packages drop a respondent totally from such analyses for having only a single missing answer, sometimes out of 100 or so items. Several times the ultimate user of such analyses will be looking at their multivariate analyses for marketing insights only to find that the analyses weren't performed at all due to every respondent having at least one missing answer. These, at least, wave a red flag. Even worse are the analyses which are performed, retained and acted on even through the base sizes were only 10 or 15--those who answered everything requested in the survey. Again, the computers are merely following orders.

The missing data problem can be severe, but generally unnoted, when discriminant based perceptual maps are drawn. Reliability can be a real problem when the bases for such maps are only 10 or 15 respondents, but the mapping algorithms perform anyway--quickly and easily. Also, you can get maps

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done when the different brands shown are rated on different attribute lists or the attributes are scaled differently on the questionnaire. So-called multiple correspondence analysis maps have been produced from several 2-variables crosstabulations, rather than going back to the respondent data. They show all of the points required, even though the coordinates were not generated as they should have been. Then there was the discriminant based map which used such a high significance level that the attribute directions were essentially random. The map made no sense because someone told the computer to use a high significance level instead of a high confidence level. The computer didn't balk; thus, the analyses which could be done were done but the analyses which *should* have been done were not done.

The mystique associated with statistical computer programs is not limited to those commercially available. A computer program was specifically written to perform a non-standard, but still valuable, statistical procedure. As in most such cases, textbook data sets were used to test the program, which performed well. Unfortunately, the degrees-of-freedom were set as a constant value, 4, irrespective of the number of respondents and/or stimuli. No one noticed this one for weeks, mainly because everyone believed that the printed value should be correct; after all, the computer said it and the program was easy to use.

It's also easy to get in trouble, since the computer is like Ado Annie (it "cain't say no"), on some harmless looking analyses. In one such study, a series of attribute ratings were of the variety

"Too Big," "Just Right" and "Too Small." These were coded and entered into the data file as 1, 2, and 3, respectively. Two products compared on one such scale showed Product A with 3 vote for "Too Big" and 112 for "Just Right." Product B had 23 respondents say, "Too Big," 59 say, "Just Right" and 33 respond with "Too Small." Obviously, the products are different with respect to this scale. However, the computer was instructed to do a dependent t-test on the *means* which turned up as not significantly different. If only the computer could have said no!

Computers also don't question you (or me) when you try to analyze dependent samples as if they were independent (or vice versa) as long as the data fit the required format for the test. They also don't ask if you have an overlapping sample for analysis--they just do as they are told.

In one survey, the project director designed the study to test for order bias by using all 6 possible rotations of the 3 brands in the survey. Here the sin was of omission--the CRT interview did not capture which rotation was used on which respondent. Here, too, the computer did exactly as it was told--it just wasn't told to do enough. An easily used CRT interviewing package was involved in this one.

Conclnsions

It would be nice to say at this point that the above cases were all apocryphal. Alas, none of them are. This is not to say that you need to be totally paranoid every time you skim a computer generated statistical analysis, although a little paranoia may not hurt. The point is that the easier-to-use the statistical programs become, the more self-styled statistical experts seem to turn up--statisticians-on-a-chip, as it were. Doing the wrong thing or doing the right thing incorrectly, just because the computer programs allow it, is probably more harmful to a marketing research project than not doing anything at all. At least in the latter case, getting no answer at all is probably less harmful than getting the wrong answer (it sure is when I type "variable").

It's also not as simple as comparing the means from the statistical analysis with those from your crosstabulations. If they agree, then the statistical analysis must have been done correctly; if not, the advanced analysis must be wrong--right? Not quite.

In one recent study, the statistical analysis was correctly performed, on carefully "derotated" data and the means didn't even begin to agree with the data tabs. You guessed it--the data were not derotated before the tabs were done. The statistical analyst was questioned at length about the disagreement between the means, as well. In this case, at least, it was the easier analysis which the computer didn't question--and should have.

Nor is a solution coming through the haze of my crystal ball. Both the American Marketing Association and the American Statistical Association have wrestled with and continue to wrestle with the issue of certification, but that's probably overkill for this type of problem. Even assuming that certification would help, it's still a long way off. At the very least, we need to ask questions, lots and lots of questions--not just of our data but of those who ask questions of our data. Taking computer printouts at face value can be very risky until computers are programmed to know "what" as well as "how."



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Discrete choice and conjoint analysis—a reply

by Steve Herman

Editor's note: Steve Herman is vice president of Bretton-Clark, a New York-based research software company. This article was written in response to Robert Roy's October, 1990 Data Use article "Conjoint evolves into discrete choice modeling." A reply by Robert Roy follows.

A recent article in this journal announced the demise of conjoint analysis ("Conjoint evolves into discrete choice modeling"). We believe this obituary is premature and that the article contained a number of significant omissions and errors.

The author first states that the designs employed in conjoint analysis impose special constraints which often lead to unrealistic product descriptions, whereas no such constraints are involved in the designs used in discrete choice analysis.

This is simply incorrect. Both conjoint analysis and discrete choice analysis use fractional factorial designs to generate product descriptions. To the extent that both techniques use the same basic designs, they cannot differ in terms of unrealistic product descriptions.

Moreover, detecting unrealistic product descriptions is actually a quick and relatively trivial matter. Respondents in a conjoint task generally require less than fifteen minutes to complete the entire conjoint task. Researchers and clients can screen the product descriptions in considerably less time.

However, this entire discussion assumes that realistic product descriptions are of major importance. In fact, a number of research studies indicate that product realism has little impact on the validity of conjoint studies. For example, one study included unrealistic combinations of engine size and gas mileage. Despite the fact that some combinations far exceeded the performance in today's market, the authors found that this had no deleterious effects on the results of the study. Although it is widely believed that unrealistic stimuli are detrimental, published research studies consistently demonstrate that this is not the case.

In fact, by modifying fractional factorial designs to increase the realism of product descriptions, you sacrifice some of the beneficial properties of these designs. For this reason, changing these product descriptions can actually lead to a loss of predictive validity.

However, we believe that product descriptions which involve "impossible" or "highly implausible" products, as opposed to simply unrealistic ones, can degrade the results of conjoint and

discrete choice studies. To date, however, there is no published evidence to support even this modest hypothesis, and further research is warranted.

We would now like to discuss a difference between conjoint analysis and discrete choice analysis which Mr. Roy acknowledges but glosses over. In conjoint analysis, a respondent typically evaluates all the product profiles required by the experimental design. Therefore, the researcher can measure each respondent's utility function. (The utility function quantifies the respondent's degree of preference for each of the product features being studied, as well as the levels associated with each of these features.)

In discrete choice analysis, on the other hand, it is generally impossible to have a respondent evaluate all the scenarios
continued on p.44

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Business intelligence: much more than a business-to-business buzzword

By Kirk W. Tyson

Editor's note: Kirk Tyson is president of Chicago-based Kirk Tyson International.

Business-to-business research in the age of time-based competition is taking on a new look. It's called business intelligence, and everyone is getting into the act.

Companies are now realizing that more timely and relevant information about competitors and other market players is necessary for making good strategic business decisions. Companies now know that a once-a-year analysis of their business environment is not enough. Markets are becoming increasingly global, and the information revolution is slashing the time available for effective decision making.

Business intelligence evolved in the 1980s as a hybrid function of strategic planning, marketing research, and systems activities. It is not a function that replaces these activities, but augments them with time-based methods. Most companies have been developing or fine-tuning their business intelligence function over the last several years.

In the 1970s companies were just starting to engage in strategic planning activi-

ties on a broad scale. Competitor analysis, customer analysis, and supplier analysis were important ingredients in that overall process. However, most companies were not organized to collect and analyze the information in a routine and systematic way. In addition, research and planning activities were separate functions with no interaction.

The emphasis in the 1970s was on developing strategies. Today's focus is on implementing them. Because of the new emphasis, strategic decisions must be made on an ongoing basis. Ongoing strategic decisions require a continuous stream of information. Business intelligence systems provide this continuous stream.

The number of companies developing intelligence groups has risen sharply. Most companies have focused on competitors and have chosen to develop a competitor intelligence function. It is not uncommon today to find the job title of Manager of Competitor Intelligence on a company's organization chart. The concept of business intelligence has been around a long time, but in the late 1980s it finally came of age. The intelligence group no longer consists of a secret file cabinet in the researcher's office. Companies are no longer bashful about their

intelligence activities. In fact, there is now a Society of Competitor Intelligence Professionals with almost 2,000 members.

Business intelligence does not require the knowledge and use of sophisticated techniques or the development of new skills that are not currently available somewhere in most organizations. Rather, it is focusing existing skills and techniques in a direction and for a purpose that is new to many companies.

Four success stories

Let's move beyond the generalities and take a look at four examples that show how companies used intelligence to gain a competitive advantage.

Construction of a New Plant: Not One but Five

SITUATION: A large consumer products manufacturer discovered that a major competitor to several of its product lines was building a new plant. It was unknown whether the plant would produce directly competing products or, if so, what competitive advantage the competitor hoped to gain by constructing the new facility.

RESULT: Discussions with community leaders, architects, construction per-

sonnel, and plant management revealed the competitor's plant was slated to produce directly competing products. It was also learned that the new plant was being designed to significantly reduce manufacturing costs. It appeared that the competitor would begin competing on the basis of price rather than differentiation. The intelligence efforts also yielded the fact that the company was not building just one plant, but five! As a result, the company modified its sales approach to deflect the price issue and build on the strength of its product features.

New Product Strategies: Back to the Drawing Board

SITUATION: A medium-sized manufacturer of consumer electronics equipment was facing declining sales and market share because of the inroads of two privately held companies. Company management felt these two companies were gaining market share because of new product features being offered.

RESULT: Interviews were conducted with customers, securities analysts, suppliers, trade journal editors, and the competitors themselves to uncover the product strategies. As a result, the company determined how best to modify its own product design to avert further market share erosion.

R&D Activities: Development of a Revolutionary New Product

SITUATION: A health care equipment provider was interested in knowing the research and development projects of a key competitor.

RESULT: Interviews with competing R&D personnel revealed the competitor had several new products under development. One of these products had the potential of significantly altering a key part of the industry. As a result, the company redirected the priorities of its R&D group to develop a similar revolutionary product.

Acquisition: A Rock Thrown in the Pond

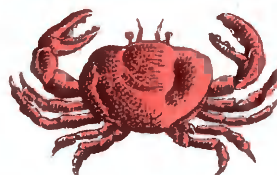
SITUATION: Employees of a large

manufacturer had heard rumors of a significant competitor being acquired. If acquired, the competitor would have the additional resources it needed to become a national threat. It could expand its previously narrow product line and increase the size of its sales force.

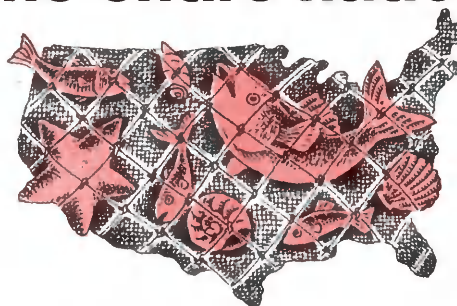
RESULT: The rumor was confirmed in time for the company to prepare the needed marketing program to address the market changes.

These examples illustrate how business intelligence has many positive results for organizations, large and small, in almost every industry. What makes business intelligence different, however, is that these results were generated in hours and days instead of the weeks and months that would be required with more traditional research and planning methodologies.

continued on p. 51



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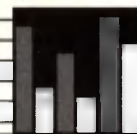
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Poll finds Americans unsure of air bags, tough on drunk driving

Decades of technical innovations and governmental regulations designed to make the nation's highways safer have resulted in widespread support for stricter auto safety and drunk driving measures, yet many individuals remain confused about the role and value of auto safety devices, according to a nationwide survey conducted for General Motors and Prevention magazine by Louis Harris and Associates, Inc.

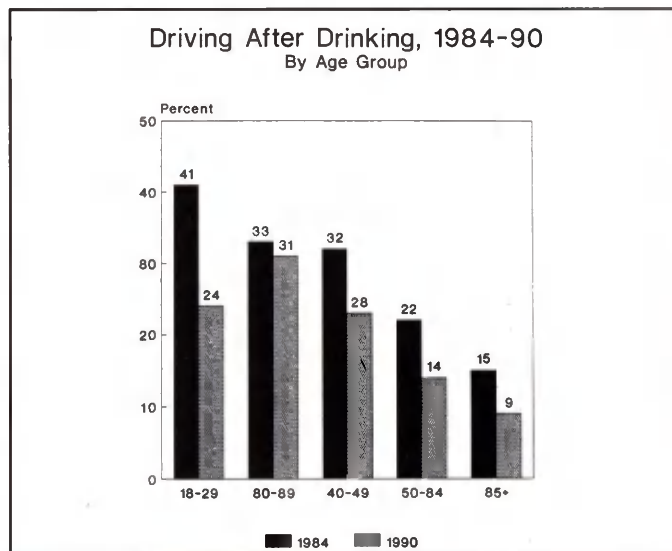
The survey found overwhelming support among adults for the imposition of state laws requiring the wearing of seat belts. Overall, eighty-one percent of those

questioned support such measures. However, only a slight majority of those ques-

tioned—51%—believe that air bags offer better protection in a crash than just seat belts.

The survey found that 72% of adults questioned in states without seat belts would support governmental policies mandating seat belt usage. In addition, in states that already have seat belt laws, 83% of adults surveyed say they favor these laws.

Americans are extremely concerned about the



safety of airbags. Among those surveyed, 18% or nearly one in five adults believe that air bags can cause serious injury when they inflate. Similarly, 35% believe that air bags can trap people in their cars when inflated. In addition, thirty eight percent of those asked say that accidental inflation of airbags is a serious problem. Although individuals expressed great concern over the value of air bags, a significant minority of those questioned—nearly 30%—say they would be willing to pay an additional \$500 for a car equipped with an air bag.

The study found that American men have more confidence in the value of air bags than do women. According to the findings, 59% of the men surveyed say that air bags provide better crash protection than seat belts in an accident com-

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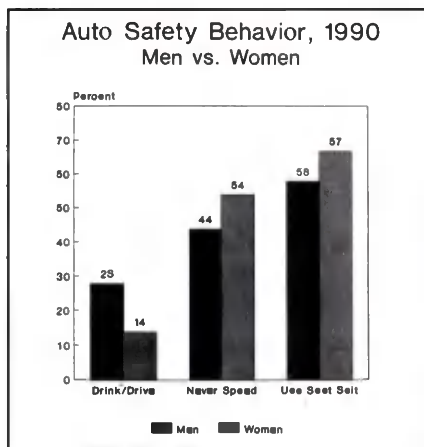
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pared to only 43% percent of women who expressed this confidence.

"There is no doubt that the high level of uncertainty about the safety of air bags contributes to the limited interest in spending more for these devices," says Thomas Dybdahl, of Prevention, and au-



thor of the report. "Greater public understanding of air bags and their benefits would likely result in greater willingness to pay for them."

The study also attempted to determine the impact of tougher enforcement of laws relating to drunk driving on the behavior of drivers across the nation. One key finding is that one in five Americans admits to driving after drinking. Even more alarming is the fact that college educated, affluent professionals are almost four times as likely to drive after drinking than those without high school diplomas (31% vs. 8%).

Additionally, people with household incomes of above \$50,000 drive after drinking at more than double the rate of those with incomes below \$15,000 (32% vs. 15%).

The survey found a significant difference in the behavior of men compared to women in the area of driving after drinking. According to the report, men are "twice as likely" as women to drive after drinking. Twenty eight percent of men admit to this behavior compared to 14% of women.

There has been a surprising drop over the past seven years in the percentage of young people who say they dive after drinking. Since 1986, there has been a 17 point decrease (from 41% to 24%) in the numbers of adults aged 18-29 who say

they sometimes drive after drinking. In sharp contrast, among those aged 30-39, there has been only a two percentage point decline (from 33% to 31%) in those saying they sometimes drive after drinking.

Americans have little tolerance for drunk driving, the survey found. Among those questioned, nearly two-thirds, or sixty-four percent, would like to see the minimum age drinking law enforced more vigorously. And, seventy-nine percent support expanded use of police roadblocks or check points to reduce drunk

driving.

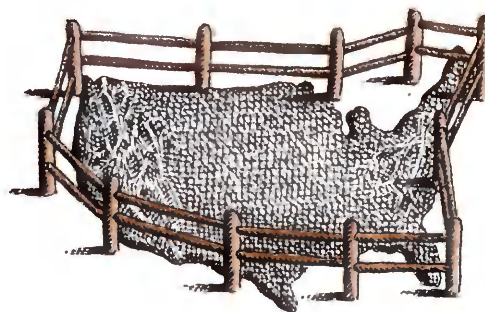
The extent of Americans' concern about enforcing drunk driving laws is most notable among those who support automatic suspension or revocation of a driver's license for driving when drunk, with eighty-nine percent of adults favoring such measures.

This support is spread across the national spectrum, and is even voiced among those who admit to driving after drinking, with four out of five of these individuals supporting license and license plate sus-

continued on p. 40



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NAMES OF NOTE



Michael J. Hothorn has been appointed managing director of *Focus First America*, Stamford, CT.

The board of directors of Chicago-

based *Information Resources, Inc.* has named **Gian Fulgoni** as chairman of the board, a post vacant since the resignation of John Malec in October, 1990.

Luanne Cattuna has been named deputy director, worldwide market research for the *Motion Picture Association of America*, New York.

Barry D. Davis has joined the Dallas office of *Elrick & Lavidge, Inc.* as vice president.

Gail L. Jackman has been named vice president of Bethesda, MD-based *Shugoll Research*.

Irving Roshwalh, technical director of *Audits & Surveys, Inc.*, New York, has been promoted to executive vice president. He had been senior vice president.

The Heller Research Group, Port Washington, NY, has promoted **Alan Levine** to executive vice president, director of marketing, and **Arnold Diamond** to executive vice president, director of research.

The Dallas office of *Bozell, Inc.* has named **John D'Acierno** senior research analyst, and **Dyane Okland** research assistant.

Bill Sidwell has been promoted to planning and research supervisor for *Ogilvy & Mather*, Houston.

Elaine Herron Cravens has been named executive vice president and manager of the Tampa, FL office of *Herron Associates, Inc.*



Herron Cravens

Tyler Nufer

Maritz Marketing Research has named **Julia Tyler Nufer** senior account manager at its full service division in Artesia, CA. Previously, she was with *Clorox, Inc.*

Market Strategies, Inc. has added three new staff members: **Roh Klein**, research director; **Carol Hurwitz**, research director, and **Angela Blandina**, research assistant.

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Central Florida Market Research, Inc. a data collection and data processing firm, has opened offices in the greater Orlando metropolitan area at 1065 Maitland Commons Blvd., Suite 204, Maitland, FL 32751. Phone 407-660-1808. Fax 407-660-9674. The facility includes a focus group room and a monitored telephone center with WATS and local service.



Hispanic Market Connections, Inc., a bilingual, bicultural market research firm, has moved to a new address at 5150 El Camino Real, Suite D-20, Los Altos, CA 94022. Phone 415-965-3859. Fax 415-965-3874.



John P. Dolan and Nancy Johnson Stout have formed **Dolan & Stout, Inc.**, a firm specializing in providing information to businesses, government agencies and non-profit organizations to be used in marketing, product development and financial decision making. The address is P.O. Box 261236, Lakewood, CO 80226. Phone 303-987-0582.

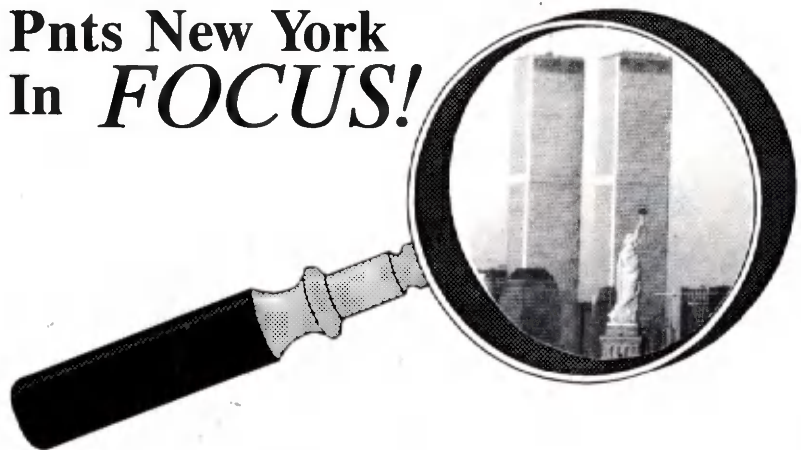


Market Strategies, Inc. has moved to

new, larger corporate headquarters at 1000 Town Center, Suite 1600, Southfield, MI 48075. Phone 313-350-3020. Fax 313-

350-3023. The address and telephone numbers for the research operations center in Livonia remain the same.

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National survey follows consumer use of financial services

Equifax Marketing and Elrick and Lavidge Marketing Research have jointly released results from Financial Forum, a national survey of 13,500 households containing use and demand information for more than 100 financial services. Financial Forum is the first survey from the Equifax Forum, which obtains first-hand

information on consumers' needs and preferences in the marketplace.

Financial Forum includes data on product usage (i.e., checking accounts, credit accounts, life insurance policies) within different stages of consumers' lives and lifestyle profiles. Lifestyle profiles detail the financial behavior of people of different ages, incomes, and family situations with differing financial needs. According to John Davis, assistant vice president, Consumer Forum, "The study results reveal how consumers use combi-

nations of financial services like those provided by banks, insurance companies, and brokerage houses. For example, the data might reflect the ages or life events at which time consumers start or stop using different financial services. Then consumers are segmented into ZIP +4 groups reflecting similar usage patterns and household characteristics." This enables Equifax to generate profiles of consumers who would likely be interested in different financial services.

Study results are available as a magnetic tape data file by contacting the Financial Forum Hotline at 800-67P-ANEL. Also available are analytical reports and PC Infomark files. Infomark is a desktop marketing system with a variety of marketing databases and mapping capabilities.

New enhancements for CHOICES

Simmons Market Research Bureau announces enhancements to its CHOICES system. The Crosstab Trender provides users with the ability to analyze up to five years of Simmons data on a single screen. Users can calculate year-to-year differences from a base year, a prior year, and on an average of all the years being analyzed. Year-to-year differences that are

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statistically significant can be flagged. And output can be sent directly to Lotus ".WKS" files. Choices has always had English language dictionary capabilities which eliminate the need for card/column/punch coding. Now the dictionary usage has been expanded to do the search for you. With the Dictionary Searcher, users type in the subject and the system locates the information, eliminating multiple steps.

In addition, Choices now has a workscreen which is visible throughout the input process, so work can be reviewed as it's being created. Logical operators can be directly entered or edited into definitions on the screen, so users can view the statement as it's built. For more information, telephone Simmons MRB at 212-916-8900.

Demosphere to distribute Claritas products

Demosphere International will now distribute the Compass desktop market analysis system and PRIZM neighborhood lifestyle target marketing software

products from Claritas Corporation. Claritas welcomes this agreement as a means of complementing its primary domestic sales outlets. Likewise, Demosphere International has, until now, concentrated on market segmentation databases for countries other than the United States. Demosphere's president, Jay Baker, was a founding partner of Claritas and helped develop the Compass software. For more information, contact Demosphere International, 703-241-0500.

Data on credit shoppers available

National Planning Data Corporation (NPDC) has joined forces with TRW Target Marketing Services to offer credit shopper market summary (CSMS) data. This information is designed for site evaluation and target marketing applications. The data can aid in the evaluation of the credit profile of a market area, including credit shopper penetration, saturation and market potential. In addition, the data provide information for

analysis of credit shopper activity to assess responsiveness to new credit offers.

NPDC has developed a CSMS report which can be summarized by geographies as small as ZIP codes and census tracts. Data for larger geographies—counties, metro areas, Yellow Pages directory areas, and user-defined market areas (such as rings and polygons)—are available as well. Custom reports combining additional, non-credit related information with the CSMS data can also be provided to satisfy specific client needs.

TRW maintains data files covering more than 150 million individual consumers in over 80 million U.S. households. Information on credit shopper households is compiled from more than 25,000 sources nationwide. Many of these sources are governmental bodies which regularly provide much of their information to the general public. Only general credit information is included in this assemblage of data. The resulting CSMS information reveals nothing about individuals and is in compliance with all regulations governing the use of indi-

continued on p. 39

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Defining the system of needs in an industrial market

by Cliff Havener

Editor's note: Cliff Havener is president of Growth Resources, Inc., a Minneapolis-based consulting firm.

The most functional and fundamental means of identifying a market is by its systems of needs. By literally seeing the purchase decision maker's problem through the decision maker's eyes, it is quite easy to determine:

- what combination of product charac-

teristics represent real value,

- how to communicate the product for the maximum perception of value, and, once that's done,

- how likely the respondent will be to buy.

This may not be a unique point of view. What is unique, however, is the ability to precisely define a set of benefits that meets needs and can accurately predict purchase response. There are some sophisticated software packages that provide some insight, but they don't incor-

porate enough context to allow the level of clarity and predictability that's possible when a perceptive mind looks at market needs.

The real challenge in "need research" is in consumer markets, where individual values drive attitudes. Attitudes towards a subject, combined with the potential user's goal for that subject, form attitudinal need systems. When systems of perceived benefit are interfaced with need systems, "unmet" or partially satisfied needs are identified.

However, this article is about need research in industrial markets, which is considerably more straightforward than in consumer markets, although it follows the same process. What makes it "easier" is that each respondent's job—not his or her personal values and attitudes—pretty well defines his or her priorities toward the subject. Consequently, markets are more homogeneous, generally speaking, with less individual variance from prospective user to prospective user.

The appropriate starting point is to segment the market by the variables that create different perspectives about the same subject. For example, we recently did a study designed to "find a home" for an electronic controller for air compressors.

Specifically, the study had to identify the "problems" users of compressed air

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had with this practice, to determine those the controller could solve. Therefore, the market segmentation, based on attitudes and objectives about use of compressed air, was designed to identify different problems held by different groups of users. It was to differentiate need systems.

This specific controller handled on centrifugal compressors, not rotary or reciprocating compressors. Step one was to identify industries with a high incidence of centrifugal compressors in use. The next was to identify those industries where consumption of compressed air was a major component of total plant energy use. The perspective that drove this cut is that people make greater investments to solve big problems than to solve little ones.

Once we had a list of those industries that were the heaviest consumers of compressed air, we then did the actual segmentation based on the nature of demand on the compressed air being produced and used. It was likely that an industry such as textiles that uses compressed air continuously to drive precision equipment would view its operations—and hence, its needs—very differently from an industry that used compressed air in batches, on fairly coarse equipment such as air powered hand tools, like many plants in the automotive industry.

The focus in designing a theoretical segmentation is identifying those fundamental factors that are likely to create very different definitions of needs from one type of prospective user to another.

The next step in the process was to define the purchase decision chain, that is, all jobs or positions in the company that influence the purchase decision. The influence may be direct, as in evaluation of the solution offered to the problem, or it may be indirect, as in the definition of the problem itself. Job titles will often change from industry to industry, even from company to company. The levels of influence of each player in these multi-level purchase decisions will change from company to company. Therefore, in scheduling interviews within any company that represents a market segment, it's critical to identify who the "players" are in that company, and then talk to all of them.

Remember, the product—the solution

to their problem—has to be seen as the best solution to the problem by each purchase decision contributor in order for it to pass through all the screens and be actually purchased. Each of these "screens" is different—each job has different priorities and concerns. Because of that, the "solution" actually must be positioned differently to the different need systems or points of view that make up the company's purchase decision process.

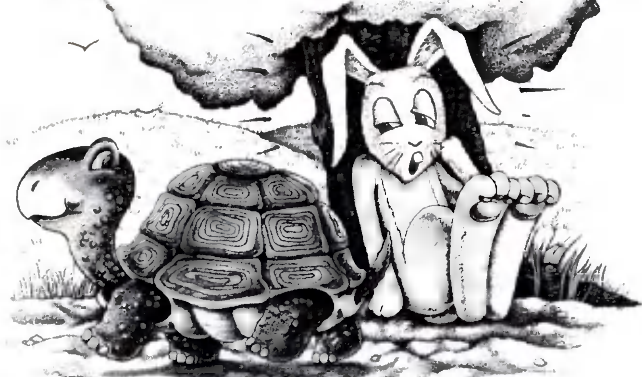
In the case of the compressor project, we talked to: powerhouse managers who

were ultimately responsible for the performance of the compressed air supply system; plant based manufacturing engineers; corporate based manufacturing and energy management engineers; plant managers and plant comptrollers. The one job didn't interview was "purchasing agent," because the definition of both the nature of the problem and desired criteria for a solution came from various combinations of the above jobs.

Once we knew who to talk to, the next trick was to find out how to talk with them

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The product management/ marketing research partnership

by Paul Colburn

Editor's note: Paul Colburn is manager, marketing research, with Glaxo Inc., Research Triangle Park, North Carolina.

During my five years at Glaxo, a British-based pharmaceutical company, the company has experienced rapid growth. It is now the number two pharmaceutical firm in the world and the fifth largest pharmaceuti-

cal firm in the United States. At Glaxo, the marketing research department is an important part of the marketing team. The firm has developed a strong working relationship between brand management and marketing research. This article fo-

cuses on my formula for success.

Partnership: as simple as one plus one

One participant's goal is to ask marketing questions; the other participant is interested in answering these questions. This is the working partnership of product management and marketing research. The word partnership itself suggests a definition of two parties allied in a cause, working together toward one goal, in this case, a business goal. The partnership that develops depends upon the two independent parties understanding each other's needs and goals.

Communication: as simple as one on one

A major part in any partnership is communication. For communication to be successful, a definition of the needed information is critical. The problem definition must create a common understanding for both product management and marketing research.

In addition, the definition of product management and marketing research within a firm must be clear. Questions like, "Where is the focus of marketing research at our company?" "What is the core of the needed information?" "Is the focus on the marketing problem, or the research methodology?" must be answered.

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To paraphrase an old saying, "You are only as strong as your weakest part." Another way of saying this is, "You cannot understand the whole picture if there is a lack of communication among your individual parts." If one participant does not understand the true focus of a marketing question, communication can become mixed. Weakness can occur in the product management/marketing research partnership when there is mis-communication or inappropriately defined terminology.

For a true partnership to be successful, we must develop an increased understanding and awareness of each other's needs, expectations and roles. Not only is there a need to define what marketing research is, but also to gain a full understanding of the role of marketing research. This is direct understanding between two interdependent groups, one on one.

Analysts don't just throw darts

Marketing research doesn't take "shots in the dark" at getting information. A question comes from product management, such as "Where do we want to be?" Then, marketing research provides the needed information to identify and fill the gap between where we want to be versus where we are.

Marketing research can become the business function that links the customer to the marketer through information. The major uses of the information are to identify and define marketing challenges, refine and check marketing actions, and monitor market performance.

In short, marketing research is not a reckless dart thrown at a board hidden by uncertainty. Rather it is a concise, streamlined dart guided to a board by the hand of product management. The board is not a vague pool of data, but rather the proper target data to answer the marketing questions facing the product team.

The role of marketing research

Defining marketing research does not offer an understanding of the role of marketing research. The role of marketing research can be broken down into 5 phases:

1. Specify the information needed to

continued on p. 50

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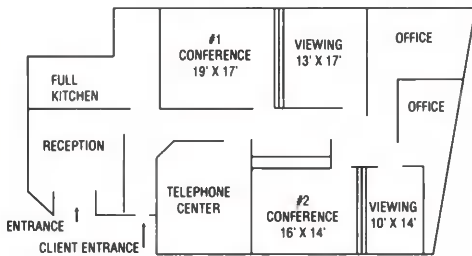


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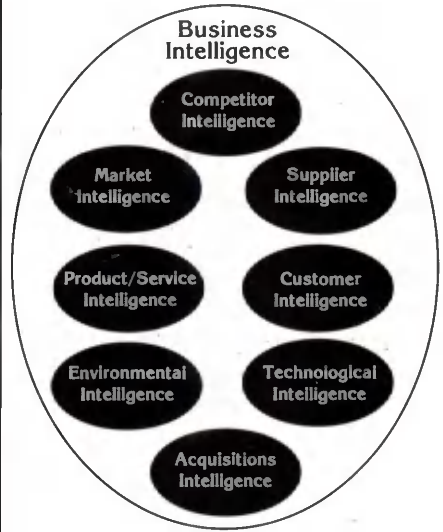
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Business Intelligence

continued from p. 17

Business intelligence defined

Business intelligence has many facets, as illustrated in this chart. It is an analyti-



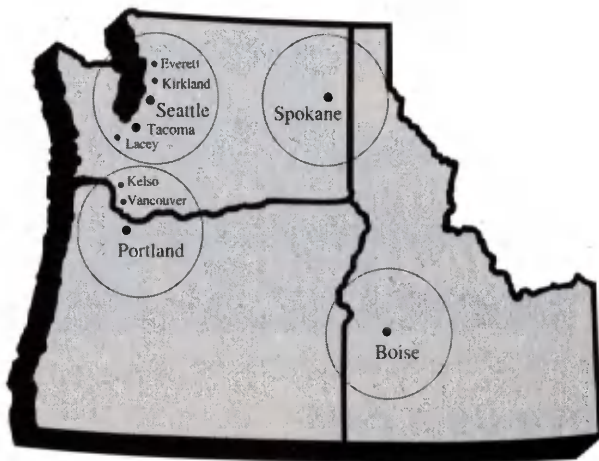
cal process that transforms raw data into relevant, accurate, and useable strategic knowledge — and in short timeframes. It is information about a competitor's current position, historical performance, capabilities, and intentions. It is information about the driving forces within the marketplace. It is information about specific products and technologies. It is also information external to the marketplace, such as economic, regulatory, political, and demographic influences that have an impact on the market.

Continuous monitoring and benchmarking of competitors, customers, suppliers, and other industry forces should be an integral part of the overall strategic management function of all companies. Continuous monitoring prevents a company from being surprised. By keeping apprised of industry developments and competitive activities, a company can take appropriate and timely action.

The historical problem with business intelligence has been that it has not been organized. It has been performed in a random, haphazard manner by employees using only the most common sources

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of information. The employees read trade journals. They attend trade shows. They talk to their salespeople or have them record intelligence on their call reports. But they have not gone beyond these kinds of activities or used them as a springboard for unearthing the more valuable information that is available.

The many benefits of a formalized approach

As much as 95 percent of intelligence is available just for the asking. The challenge is to build an informal network that actively seeks out the information in a routine and systematic manner.

This does not imply a large mechanized system or organizational empire. It means a formalized process for gathering and analyzing information.

Effective strategic management does not start or stop with senior management. Business intelligence must not either! For example, the sales organization needs to know what the competition is offering and how the company's products and services can be differentiated. Production and distribution managers need to know what new techniques competitors are using to improve quality, maximize efficiency, and reduce costs.

Just as business intelligence is used at all levels, it must also be collected at all levels. Wherever and whenever business intelligence is found, it must be synthesized and disseminated to those in the organization who need it. This process must become a natural part of the daily business routine.

Organizing to effectively exploit business intelligence does not require an extensive centralized staff, sophisticated systems and techniques, and a large budget. What it does require is a small number of employees and just one coordinator who makes the most of his or her time by utilizing others in the organization. The coordinator actively promotes data gathering, summarizes the results, prepares reports and distributes information to those who need it. Others throughout the organization collect data and analyze its potential impact.

You may ask, "Why engage in business intelligence activities?"

The most important reason: To avoid surprises.

Holiday Inn used to advertise, "The best surprise is no surprise." This maxim also applies to business intelligence. Nothing is worse than to be surprised by a competitor's move in the marketplace, when the information easily could have been obtained well in advance. Business intelligence can help to identify threats and opportunities in the marketplace, and it can help companies gain a competitive advantage by decreasing reaction time.

A by-product of this activity will be greatly improved long-term, and even short-term, planning. □

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in a wide range of industries, with the goal of uncovering the variables that make up affinity towards a publication. These groups generated a list of 120 factors that fell into seven categories: value, editorial, advertising, format, organization, qualitative measures, imagery, and psychographics. The groups were structured to obtain responses from readers of publications that prior research had shown had low, average, and high levels of affinity.

The second phase was designed to trim the 120 factors to a more manageable number. "We realized that there was redundancy on the list, so we moved to the data reduction stage, which was intended to reduce that list of 120 items to the key underlying constructs," Yaffee says.

Questionnaires were mailed to 3,000 readers (1,000 in each of three industries) of a wide range of magazines to get respondents in high-tech vs. low-tech industries, large vs. small companies, and a range of publication formats—tabloid, standard magazine size, etc. The result-

ing items were tested again in the final phase, a pilot Affinity study of over 5,000 readers across five industries—interior design, electrical engineering, construction, MIS/information management, restaurants/foodservice.

More reliable

Yaffee says that because Affinity is standardized, it offers more reliable data than that obtained from the usual reader preference studies that publications perform. "In a reader preference study, you choose the questions you're going to ask, and you know what you're publication's strengths and weaknesses are. What we've heard from (media buyers) is that they often discount the answers they see in reader preference reports because they know that publications are only asking about their strengths."

Affinity also serves as a diagnostic tool, Yaffee says. "We don't just say, 'O.K. here's your score.' We also provide crosstabs that enable people to go into the data and to look at the percentages of people that agree or disagree with each of the statements, and to flesh out to the extent possible some of the questions that arise from the research."

The system can be used, for example, by a publication in a highly competitive market as a "tiebreaker" of sorts to differentiate itself from other industry magazines. Also, publications that aren't necessarily the biggest in their industry but feel they have strong reader loyalty can use the system to document that loyalty.

"Affinity has really struck a chord with a lot of magazines who have never positioned themselves in terms of the size of their audience but who have positioned themselves in terms of the quality of the publication and the reader loyalty they generate.

"One of the important ideas behind Affinity is that a publication with high affinity will have a better than average likelihood of being read thoroughly and of having advertising seen and advertising used. So for those publications that have really bought into the whole notion of the relationship between the reader and the audience rather than strictly the size of the audience, Affinity has touched on something that they've been selling for a long time." □



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Retooling Focus Groups

continued from p. 10

search the same decision makers year after year. In those instances, how the respondents are treated by the facility and moderator determines if they will return. Some participants may also be present or potential customers of the (identified) sponsor of the research. These respondents must be treated with the utmost consideration and respect. Sometimes you may have to interview all qualified respondents who show up, rather than limiting it to a group of six or eight, because these business people want to participate. Most industrial respondents do not want to be paid and sent home without participating after they've "psyched" themselves up for the discussion.

When there is a very limited pool of respondents, and you have interviewed most of them in a focus group series, should you then do a quantitative survey with the same people? If you thoroughly understand the respondents' points of view, and they ARE the universe, why go further?

When I have interviewed 50 or 60 buyers and potential buyers of a piece of equipment or business-to-business service, I generally do not recommend follow-up quantitative research. There is no need to project from the sample; we know the opinions of most of the key population. To my knowledge there is no equivalent situation in consumer research.

The last consideration determined by the limited pool of respondents in business-to-business research is that the group members may be competitors, potential competitors, and/or they might already know each other. Might this affect the quality of your information? Yes! Is there something you can do to mitigate the situation? Yes!

What I have found works best when faced with a room full of competitors is to explain upfront that they will not be asked to divulge proprietary information, nor will they be pressured to answer any question they wish to avoid. I have found that if you give them the freedom to say no, they generally will not use that right—and they will freely tell you everything you need to know.

Confidentiality

Although confidentiality concerns may arise in consumer focus group research as well, they are not as common or as critical as they are in industrial focus groups.

First, as was mentioned previously, sometimes in the course of recruiting business people it is necessary to divulge the name of the sponsoring corporation. In those instances, the respondents will not only learn of a new product idea, they will also know which company is developing it.

Second, since most industrial markets are smaller than consumer markets (and there is more communication between them), there is more concern about respondents revealing to others within the industry what they learned in the focus group. These potential breaches of confidentiality may be mitigated somewhat by thorough security screening and the use of confidentiality agreements signed by each respondent prior to the group discussion.

The third issue relating to confidentiality is quite unique to the business-to-business marketing research arena. What

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if a member of the client's marketing team hears a potential large customer say in a focus group discussion that he or she wishes a sales representative would call relating to the products or services discussed? Is that information used, or is a large sale passed up in order to completely separate the research from the sales function?

What I do in this type of focus group situation is try to have an agreement upfront with my client to determine the sponsoring corporation's preferred reaction to this temptation. If there is no agreement upfront, I will wait until the group has concluded and then ask the potential customer/respondent if he or she would like me to pass along that request for a sales call. If the respondent wants a sales representative to call, I do not consider it a violation of research principles to pass on the information. Both the respondent and client benefit from this communication.

However, the fourth and final point relating to confidentiality is that information gained in the backroom of a focus group session should NOT be used by the

client unless he or she is acting in response to a group member's request. In other words, unsolicited sales calls should not be made as a result of focus groups, and information about customer needs revealed in a research discussion should not be used to better the client's standing with individual respondents. Again, business-to-business research often draws from a limited pool of respondents. If group members hear their focus group words repeated back to them in unsolicited and unwanted sales calls, they may curtail or eliminate any future focus group participation.

Subject matter expertise

In the case of consumer qualitative research, either the moderator knows more about the subject matter than the respondents, or they are on about the same level of expertise. Furthermore, consumers do not necessarily expect or need the moderator to be an expert on the subject matter. They will gladly explain their actions or reactions, providing more depth and texture to the research.

On the other hand, business people

expect that either the moderator will have a working knowledge in their field, or at least have sufficient understanding so that the group is not bogged down by having to explain basic points.

I have found that it is not necessary for the moderator to be an expert in the field (as some believe). It is easier to take a professional moderator and provide him or her with sufficient background through a client-prepared briefing paper on key issues and technical terms than to take a subject matter expert and teach him or her group management and research skills.

In some cases, it has been necessary to have a technical expert in the focus group room during part of the discussion to demonstrate and/or answer questions about a new concept or piece of equipment. That person needs to be thoroughly briefed in advance about his or her role, and should not be the idea's prime supporter.

The technical expert should be able to answer questions and present concepts in a matter-of-fact way, a hard sell approach might bias the results in one direction or the other. It is also imperative that the

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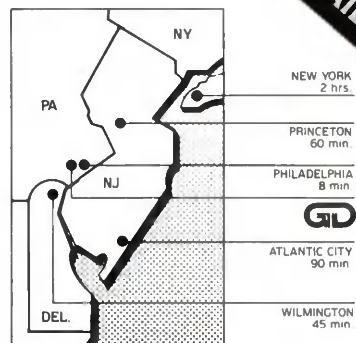
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moderator maintain control of the group discussion. No matter what his or her actual position is, the technical expert is in the group as an assistant to the moderator, and that relationship should be crystal clear to all group members.

I have also found that over time and repeated projects in an industry, the moderator's knowledge of the industry will expand to the point that less client involvement will be necessary to clarify points either before or during a group session.

Dominant group member

Subject matter expertise also plays a role from the respondents' side in business-to-business research, often encouraging a dominant group member.

While it is certainly possible and common to have a respondent in a consumer group vie for group leadership with the moderator, it is generally difficult for such a person to establish a leadership position on the basis of anything other than personality characteristics. Not so in industrial research.

Quite often a respondent will be respected and thrust into a leadership position by the other group members on the basis of his or her position, years of experience, or particular expertise. While it is important to secure the opinions and reactions of these individuals, it is also important to make sure they don't unduly influence the opinions of the other group members—or worse, intimidate them into silence!

Certain actions can be taken by the moderator to minimize the possibility of a dominant group member, and to deal with one should he or she appear:

In setting up the project, specific questions can be included in the screening questionnaire to select those with an acceptable level of knowledge and experience. Business-to-business focus group members should be as homogeneous as possible in their background and current job responsibilities. Those with much higher levels of experience and job responsibilities can be questioned in a separate mini-group or one-on-one interview.

No matter how diligent the recruiting process, there will still be intra-group differences in knowledge on particular

subjects. Thus, I always state in my introduction that there are differences in background and experience among the group members; all opinions are valuable, and at times there will be disagreement, which is natural and acceptable.

There have also been projects where because of their nature I had respondents with very different backgrounds and levels of education around the table. For example, I did a study for a major financial institution where I had very highly paid real estate attorneys, real estate sales representatives, building inspectors, and

small real estate investors all in the same discussion group. The income range of the participants was from \$30,000 per year to \$300,000 per year. In order to minimize any potential dominant influences, I did not ask (nor let) these people introduce themselves with any information relating to their occupation or employer. All they knew was that they each had some involvement in the real estate industry, and with that limited information they related very well.

A technique that I also use at times in consumer research is to have participants



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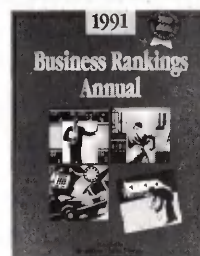
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write their answers to key questions before giving them verbally. This guarantees originality of response, and once a group member has committed himself or herself in writing, they will generally offer that answer even if it is the minority opinion. (I also ask them to write their first names on the papers, and I will check their responses when I am writing my report to make sure that what they said agreed with what they wrote.)

In instances where one or two respondents do disagree with the majority, I have found it to be important to support their individuality through my words and non-verbal reactions. In those instances, I stress that what each has to say is important, and I remind the group that at the beginning I mentioned that there would be some disagreements—as there are in the real world.

One of the most interesting questions relating to the effects of group members on each other is the question of education in the group. In consumer research, the participants are generally educated by the moderator or the materials distributed. This is a controlled education process and it is easily considered in analyzing their reactions. In business-to-business research, the moderator must be aware of how much respondent-to-respondent education is taking place, and its possible effects. At times, this educational process must also be controlled.

For example, in a consumer group if a respondent says she doesn't like the taste of toothpaste XZ, the other group members will not necessarily conclude that brand XZ doesn't taste good. However, if the telecommunications manager of one of our largest corporations recounts the problems encountered with a particular long distance carrier, respondents who have not had personal experience with that carrier will probably take that advice very seriously.

Thus, at times it is necessary to order the discussion in such a way that this type of education does not take place until after key questions have been addressed. In addition, when group members do educate each other, I ask myself if it is something that might have happened in the real world. Do they normally share experiences with colleagues? Could this conversation have happened on the job, or at a conference? The artificiality of the focus group situation must be considered in analyzing the results of business-to-

business focus groups.

I also recommend videotaping industrial focus groups in order to help identify who made which comment. Often the respondents will have different backgrounds and needs—it is important to know how each has reacted to the concepts and ideas presented. When the groups are not videotaped, I will try to call on respondents by name as much as possible so that I can identify their comments when I listen to the tapes.

This technique also minimizes the influence of potentially dominant group members, as you can identify minority opinions, even if they are only voiced once. In addition, since those respondents who try to dominate tend to interject similar comments over and over, you can differentiate that situation from having many respondents presenting and agreeing with a particular point.

The final technique to minimize the potential influence of dominant group members is to keep group size small. Business people love to talk about their occupations and their industries. The more knowledgeable they are, the more they have to say. In a group of 10-12 you will certainly have 3-4 who say very little because they are not aggressive enough, or feel others have more to say. Therefore, group size should be limited to 6-8 so the moderator can make sure that each participant has sufficient time to provide his or her input.

Conclusion

We have seen that special care and advance planning are needed for successful business-to-business focus groups. Industrial research is different from consumer research because of the demands of

- specialized recruitment
- limited pool of respondents
- confidentiality
- subject matter expertise
- dominant group members

Business-to-business focus group research is generally more expensive than consumer focus group research because of additional recruiting and incentive costs. But the reality is, we receive the professional opinion and expertise of key business people, who often purchase thousands of dollars of our products. Therefore, if done correctly, the \$40-50 per hour that we pay them is actually a bargain. Most of us probably pay more to have someone fix the office copier! □

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Product and Service Update

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vidual credit data. The data is then provided in summary form to NPDC for delivery to clients in standard or custom report formats.

NPDC's CSMS information can be output as printed reports, displayed on color-shaded maps and furnished in a form for use with popular database management, spreadsheet, and mapping software. The data are also accessible through NPDC's "MAX Online" system as an optional database in the company's "Prime Location" desktop product. For more information, contact NPDC at 607-273-8208.

Census data now ready

CACI Marketing Systems has released 1990 census data in readily usable formats, including reports, diskettes, magnetic tapes, CD ROMs and PC systems. The census data is being released by the U.S. Census Bureau on a state-by-state basis. Because of this, CACI processes the data immediately to make it available

for all businesses looking to learn more about their current and future markets. The list of available states will be updated weekly.

The data that are available include: total population counts by racial group, total population counts for ages 18 and over by racial group, Hispanic population counts, Hispanic population counts for ages 18 and over, and housing unit counts. CACI will make this data available for any location requested: radius around a street intersection, census tract, block group, town, county or state. For more information, contact Eric Cohen at CACI at 703-218-4402.

Monthly directory keeps track of corporate ownership changes

A new monthly directory offering up-to-date information on U.S. corporate ownership is now available on a subscription basis from On Demand Data. Called The Corporate Tree, the 1200+ page directory cross references all major U.S. corporations to their divisions,

groups, subsidiaries, and affiliates. It provides current information through the



use of high speed printing technology. Editorial material is updated daily and incorporated monthly into the directory. The Corporate Tree lists over 35,000 entries of major U.S. corporations, their divisions, groups, subsidiaries, and affiliates, including those listed on the New York Stock Exchange and Fortune 1000 companies. The directory is available by annual subscription or single copy. Custom services are available. For more information, call 800-753-0037.

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Survey Monitor

continued from p. 21

pension for drunk driving offenses.

Confidence in banking system wanes

According to a recent national telephone survey conducted by Maritz Marketing Research, over 1/3 of Americans are less confident in the U.S. banking system now than a year ago. A few (7%)

are more confident. However, the majority (52%) remains about as confident as last year.

Americans who depend on one financial institution for services are now in the minority. About 40% of people continue to use a single financial institution. But, according to the poll, nearly 60% use multiple institutions. Of those, 31% use two, 17% use three, and 11% use four or more.

Meeting service expectations has become a critical strategy in today's competitive marketplace. Over 90% of Americans say their primary financial institution meets their expectations all or most of the time. Seven percent say their expectations are met only some of the time.

Most people are satisfied overall with their primary financial institution. On a scale of 1-10, with ten being very satisfied, a full 1/3 rate their satisfaction a perfect 10. Eighteen percent rate their satisfaction as a 9, while 26% say it's an 8.

"In general, these are very favorable scores," says Beth Nieman, research manager at Maritz, "but there is significant room for improvement. Ideally, a firm needs as high a score as possible to retain customers and continue to grow. Financial institutions with scores of 7 or below (23%) may be particularly vulnerable to competitors."

Interestingly, almost twice the number of women as men give financial institutions a perfect score on customer satisfaction. Forty-three percent of women

rate it a 10, whereas only 23% of men do so.

Economic woes increase coupon use

In a recent survey by NCH Promotional Services, the nation's largest coupon processor, 54% of shoppers interviewed said the recession has caused them to increase their use of coupons for grocery products and health and beauty aids. Seventy-five percent said they intend to increase their use of coupons in the coming year.

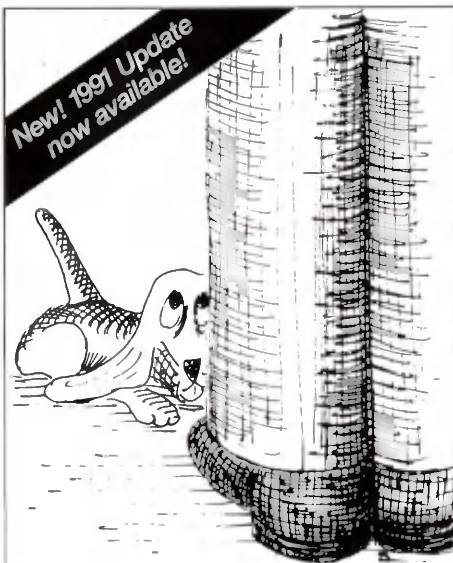
Smaller churches have difficulty reaching teens

About half of all churches in America have fewer than 100 people in the congregation. A study by the Barna Research Group suggests that these small churches may be having a limited impact on the spiritual lives of the teenagers to whom they minister. The study, *Today's Teens: A Generation in Transition*, details some of the differences between teenagers who attend a church with fewer than 100 people and those who attend a larger church. The findings reveal differences in the spiritual beliefs and involvement between the two groups of teens.

For instance, while 69% of the teens from larger churches call themselves "religious," only 48% of the respondents from smaller churches would use this term to describe themselves. In looking

toward what they want their adult life to be like, teens from larger churches were more likely to regard having a close relationship with God as a very important priority (62% to 49%). They were also more likely to place a high priority on being part of a local church when they are adults than were teens from smaller churches (49% to 34%).

Teenagers who attended a church with



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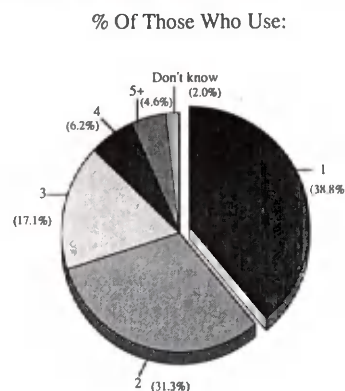
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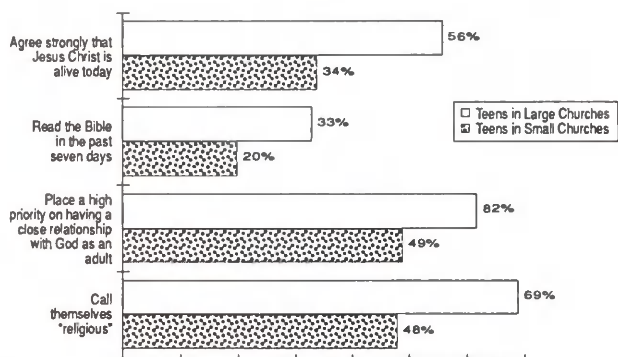
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100 or more people in the congregation also tended to have a more active involvement in the life of the church than did teens from smaller congregations.

Among teenagers from smaller churches, only 20% read the Bible in the week before their interview, and only 40% had attended church.

Comparison of Teens in Churches with Fewer than 100 People to Teens in Churches with 100 or More People



Among the teens from larger churches, 33% read the Bible in the week preceding their interview, and 62% went to church.

of the teens from smaller churches.

George Barna, president of the Glendale, California-based Barna Research

Group, says that ministry to teens is very different from ministry to adults. "Teens form a unique subculture in our population, with a unique set of needs, problems, and goals. Trying to reach them in the same way adults are reached will not address this unique position."

Barna offers a few possible reasons why smaller churches may lag behind their larger companions in ministry to teens. "Many small churches are under the leadership of a single pastor, who is expected to act as leader, counselor, business director, and teacher. The pastor is also expected to address the needs of various groups within the congregation, including teens.

"In many cases, that pastor has neither the time nor the gifts to reach out to teens in an effective manner. Some small churches also lack a sufficient number of teens to have an effective program, or the church may be relying on lay people who are not truly prepared to minister to today's teenager. Those churches often end up trying to reach teens the same way they minister to adults, because they aren't able to reach out in any other fashion."



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Needs

continued from p. 27

so as to obtain their whole view of the situation. Most so-called need research focuses too tightly, too soon, on the application or use situation. Interviewers might open by asking, "How do you feel about how your compressors are operating now?" or worse, assume a benefit of this product and present the "solution" in whatever choice of words they and/or their client dreamed up without understanding the potential buyer's perspective. Then they might ask for a reaction to the "concept."

To obtain "context," start with the person's job responsibilities. Define his or her priorities for doing the job. Determine how the person in the job sees his or her own career advancement, because when it comes to any decision, that decision will almost always be primarily driven by that person's perception of "how to get ahead."

Once this has been defined, then move to how the product application at hand does and does not support "doing a good job." For example, in the compressor

situation, one plant manager whose number 1 priority was to increase plant productivity had a list of eight areas of productivity that needed to be tightened up. Compressed air wasn't on the list in any form. How receptive do you think he would be to any promise of solving compressed air problems? How articulate will he be at describing problems with compressed air? Once you know the subject is so low on a respondent's priorities that it's effectively a non-subject, end the interview. Whatever he might say after that is worth nothing.

Another plant manager had just received a top management directive to reduce energy costs. He'd also been told by the corporate energy engineer that compressor blow-off (oversupply that is exhausted into the atmosphere and thus, wasted) could be as much as 30% of his compressor energy consumption and 15% if his total energy cost. Now, in the context of "doing a good job," how likely is this guy to pay attention to compressor issues?

From this level, we get even more specific. The respondent defines the nature and dimensions of the problems as he

sees them. That's his "need profile." For example, assuming that blow-off is occurring at the estimated level, why? Well, in his view, it's a combination of several factors:

1. Production changes its demand for compressed air significantly, hour to hour and shift to shift.

2. The powerhouse uses different combinations of compressors to supply different demand levels.

3. Rotaries come up fast but are inefficient for constant demand. Centrifugals have the opposite characteristics, etc.

There are several more factors that constitute his view of "the problem" and often, these come from specialists like corporate energy engineers and manufacturing design engineers.

Once the whole view of the usage/problem situation is defined, then isolate which factors or factor interactions contribute most to the essential problem. In the compressor situation, the essential problem is waste, due to blow-off.

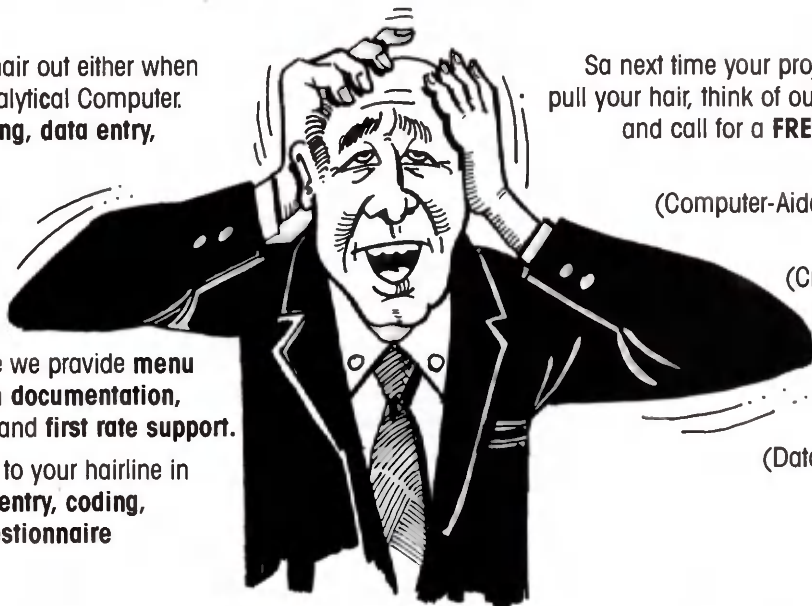
In this plant manager's mind, the primary cause of blow-off (key factors) was an inability of the powerhouse staff to anticipate changes in demand and then

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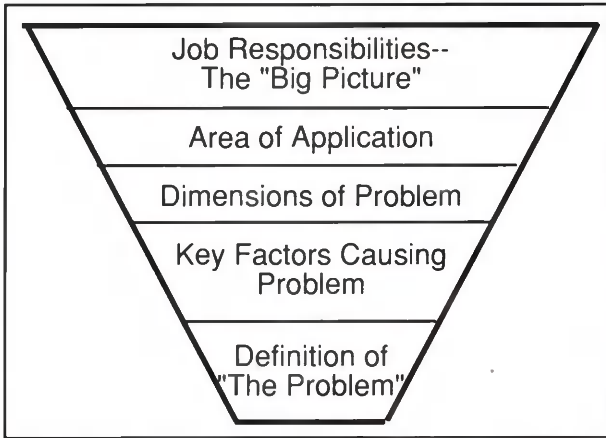
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figure out which compressors to reduce or increase, and by how much, relative to changes in demand, so that their combined output fluctuated in sync with demand. This synchronization, he believed, would eliminate blow-off caused by over supply yet would supply all the power needed up and down the demand cycles.

The combination of understanding his goal, his motivation, his view of the whole condition where the problems exist and his view of the major factors causing the problem come together to form a picture of "the problem" which is both complete and accurately emphasized.



The interviewing process I've just described can be diagrammed as shown.

The complete definition of "the problem" in this example is: "To look good in the context of management's directive to reduce plant energy costs, this plant manager is seeking a means of instantaneously adjusting and balancing a bank of compressors to bring it into synchronization with fluctuating demand, thereby reducing waste sufficiently (50% or more) that it will be reflected in reduced plant energy costs on the plant's operating statement."

If the electronic controller could produce these results, what the plant manager would buy would be "sufficient reduction in plant energy costs so that it was clearly reflected on the plant's operating statement" because he's buying career advancement, not an electronic air compressor controller.

If the manufacturer doesn't understand the

whole problem and doesn't show this plant manager how his electronic controller will very likely produce lower energy costs on the plant's operating statement, he's not likely to "sell" this prospect.

If you, the interviewer, know what the product can do, and you've done the need research accurately, you should know the respondent's likelihood of purchasing it before you ever communicate the product's attributes to him and ask him how likely he is to buy. But doing so is a good test. If the respondent's answer doesn't match your expectation, you've missed something along the way. Now you get to go back and find out what it was.

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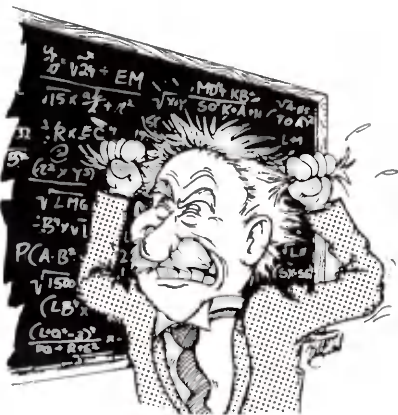
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Discrete choice--a reply

continued from p. 15

required. There are two reasons for this. First, discrete choice studies often employ compromise designs, which require many more product descriptions to be evaluated. Second, and more importantly, the number of product descriptions is only one determinant of the size of the discrete choice task. Unlike conjoint studies, where product descriptions are evaluated one at a time, in discrete choice analysis the respondents evaluate scenarios consisting of sets of product descriptions.

For example, if a discrete choice study employed a simple orthogonal array requiring only 16 product descriptions, but had respondents evaluate scenarios involving four products—i.e., select which four products they most prefer—1820 scenarios would normally be required. While techniques exist to reduce this number, these cannot reduce the number to a manageable level for a single respondent.

Therefore, even if a discrete choice study involves a relatively small number of product descriptions, the number of scenarios that must be evaluated is generally much larger than a single respondent can handle.

For this reason, discrete choice studies generally cannot evaluate each respondent's utility function, but must rely on a group-level or aggregate utility function. This has very important consequences.

If a market is segmented—that is, if consumer preferences are not identical—use of aggregate level analysis can create serious problems. This is a matter of great practical importance, since virtually all real world markets are segmented. Statisticians and econometricians refer to this problem as aggregations error. In layman's terms, this is what happens when you add apples and oranges.

We'll use a simple example to illustrate the effects of aggregation error. Suppose we are studying a product that can be described by two features—Brand and Price—and that there are two equal sized market segments, A and B. The "true" utility functions for each segment are shown below:

	Segment A	Segment B
Brand A:	2.0	-2.0
Brand B:	-2.0	2.0
Low Price:	1.0	1.0
High Price:	-1.0	-1.0

That is, both segments feel that Brand is twice as important as Price, but Segment A prefers Brand A while Segment B prefers Brand B. While this is an artificial example, it is similar to the situation for "mood items" such as various beverages and perfumes.

An individual-level analysis will yield the correct results, as each respondent's utilities for Brand and Price are recovered. On the other hand, an aggregate-level analysis will result in serious errors, as shown below:

Aggregate-Level Analysis

Brand A:	0.0
Brand B	0.0
Low Price	1.0
High Price	-1.0

The aggregate-level analysis averages the results of all respondents, implicitly assuming they all have identical preferences and utility functions. Based on this aggregate analysis, the researcher would conclude that consumers are indifferent to Brand, and are only concerned with Price. Decisions based on such analyses would prove quite costly, since Brand is actually twice as important as Price.

In fact, aggregate-level methods are inconsistent with basic marketing concepts—that the marketer should identify the needs of individual consumers and attempt to fill them. Aggregate-level methods assume that the market is totally unsegmented—a situation which rarely, if ever, exists. Thus to the extent that discrete choice analysis is conducted at the aggregate level, it can result in serious errors.

Individual-level conjoint analysis on the other hand, provides a powerful tool for market segmentation. By quantifying the preferences or utilities for each consumer, it allows the researcher to discover “benefit segments”—groups of consumers with similar preferences. Armed with such information, the marketer can position the product or develop a product line to better satisfy consumer needs.

Furthermore, benefit segments generally have a very weak relation to traditional demographic segmentation variables. Thus, traditional segmentation techniques do a poor job of capturing these segments. In addition, even if researchers conduct aggregate-level analyses for each demographic segment, serious aggregation errors can still occur.

For these reasons, we feel researchers should exercise caution in applying aggregate-level methodologies. Until research

has determined under what conditions they are preferable to individual-level methods, the dangers of aggregation error are too great to be ignored. Furthermore, they offer no advantage with respect to realistic product descriptions. While it is no panacea, we believe that individual-level conjoint analysis is still the standard for multi-attribute research methods.

Robert Roy responds:

Steve seems a tad upset. I wonder whose ox has been gored? Steve, you made the assertion that conjoint and discrete choice, “...cannot differ in terms of unrealistic product descriptions.” Oh really? “Cannot” is a big word. The Earth cannot revolve around the sun. The Copernican theory cannot be correct. And Galileo cannot preach such heresy. Amen.

“Aggregate-level methods assume that the market is totally unsegmented...” Oh really? Perhaps Steve is correct when he says that traditional conjoint analysis, “...is no panacea.” Perhaps he is incorrect in his assertion that discrete choice analysis is not directed towards market segments.

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Partnership

continued from p. 29

address the business issue at hand.

2. Design the method for collecting the information.

3. Manage and carry out the data collection process.

4. Check the data and complete an analysis.

5. Communicate the outcome and findings and make recommendations if appropriate.

These actions result in a strong partner-

ship between product management and marketing research.

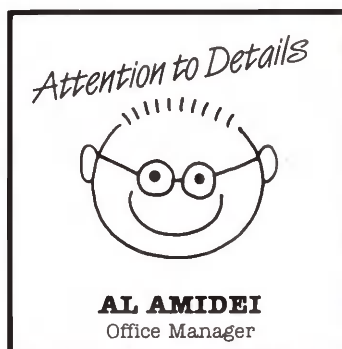
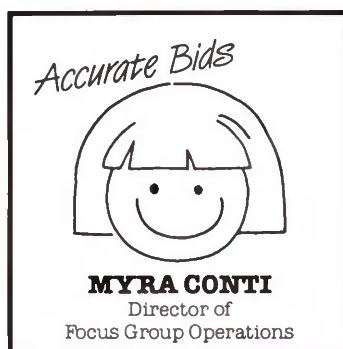
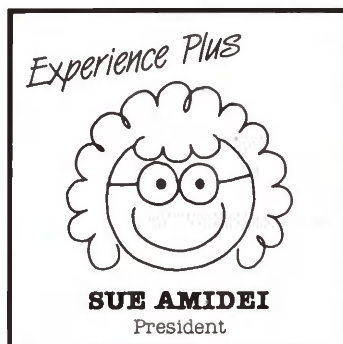
Marketing problem vs. research methodology

The research process usually begins with the product manager needing an answer to an important marketing question. For example, "How will a new competitive product affect our brand?" If the analyst immediately begins to think of ways to answer the question using a research methodology, then he/she has neglected an important rule. In this case,

the analyst overlooks the business issue. The important point here is that the views of the product manager and research analyst are usually different. The focus should always be on the marketing problem and not the research methodology.

Of equal importance, the product manager should understand that he or she needs to approach marketing research with concise business issues. He or she should avoid thinking about methodology. An example would be a product manager requesting "quick and dirty focus groups" as a way to answer a marketing question. In this case the product manager has put the methodology ahead of the business issue.

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To form a comfortable partnership: subtle reminders

There are many necessary conditions for a true partnership between product management and marketing research to exist. This partnership must work from the perspective of both functions for a sense of equilibrium to exist.

Product management should provide the means for marketing research involvement in the marketing end of the decision process. For example, certain brand managers at Glaxo allow the marketing research analysts to participate in their staff meetings. This is done to guarantee the analyst is proactive about current business issues.

Marketing research is a service function with a true focus on customer (product management) needs. A true partnership is dependent on those in marketing having a genuine respect for marketing research's contribution to marketing decisions.

Conclusion

Problem definition is the most important part of a marketing research process. This is where the partnership between marketing and marketing research begins to pay off. It is this stage of the process that usually receives the least amount of attention. It is also this stage that most serious problems occur.

Improved communications between product management and marketing research will result in true synergy and an improved understanding of the customer—which is the desired result. □

Centrex

continued from p. 7

spondents were asked to evaluate them. However, special attention was paid to creative executions that mirrored the positive, upbeat attitudes and expectations of the target market. While the respondents thought they were evaluating substance and content, their responses also were used to confirm that the tone and feel of the creative message were on target.

The terms used by respondents to describe and evaluate the test materials were carefully monitored. When the terms matched up with those used to describe personal and business expectations, the moderator probed farther. In this way, it was possible to fine-tune the creative "climate" to match the respondents' expectations, and to couch the product offering in ideas the target market was predisposed to agree with.

"To reposition the product and generate leads, we tested a series of 'blitzes.' Previously, our Centrex advertising budget had been dispersed to major markets, maintenance style, over a full year. Now we reallocated the budget, investing about three-quarters of the year's dollars in selected markets for a compressed, eight-week period," says Indiana Bell's Bob Clark.

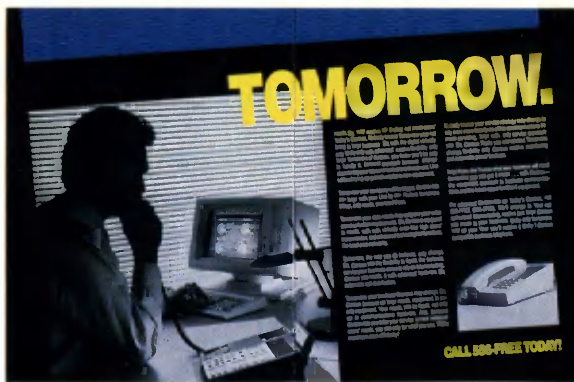
"This gave us freedom we had not enjoyed before," says Handley Miller's Scott Christie. "We could increase frequency, we could use color, and we could employ multi-media continuity over the entire eight-week advertising flight. We were able to 'tease' the campaign before revealing the full message. We developed two direct mailers, small and large newspaper ads, radio spots and a fulfillment kit."

Different approach tested

According to Clark, three separate markets were identified, and a different approach was tested in each.

In the first test market, an agent calling program was used as a control. The agents were supported by a database that had been developed earlier. Likely prospects were identified by name so that the agent could call directly on the decision maker(s).

In the second test market, the agent calling program was preceded by a two-step direct mail program. Again using the previously-developed database, the direct mail campaign was able to personalize the mailings. In the third test market, measured media (newspaper and radio) was added to direct mail and the calling program, in a sustained eight-week campaign.



"We had a unique opportunity to measure results," says Clark. "We wanted to make certain we did so as thoroughly and effectively as we could. First, we measured customer attitudes using pre- and post-blitz survey research in the three markets."

Compared with the control market in which the agent calling program stood alone:

- The market with direct mail showed a 2% increase in product awareness and an 8% increase in Centrex as the "system of choice."

- The market with both direct mail and measured media showed a 24% increase in product awareness and a 25% increase in Centrex as the "system of choice."

"Because we invested time and resources in building a solid database, we were able to track inquiries, monitor lead activity, and measure actual sales generated by the program," says Indiana Bell's Jim Talhelm.

The control market, which relied exclusively on agent calling, produced a 15% response rate. This rate, standing alone, was about 4-5 times the response rate for past Centrex efforts, and well above the 2-3% rate often projected for direct response programs. The second test market, employing both direct mail and agent calling, produced a 23% response rate. The third test market, in which measured media was added, produced a still-higher 28% response rate.

"Finally, we analyzed our return on advertising dollars invested, and produced over a ten-to-one return in the test program," Talhelm says.

Based on this experience, Indiana Bell rolled the full program into other markets in late 1990 with equally impressive results. "Two of the state's largest markets produced \$15.77 and \$24.77 in revenue respectively for each advertising dollar invested. In one tri-city market, return has been \$5.88 for each dollar invested in advertising. And the last market, in an isolated area of the state, showed a return of \$49.01 for each ad dollar invested," Clark says.

What is responsible for producing these results? "Nothing we did was truly revo-

lutionary, although we tried to be creative every step along the way. Indiana Bell was willing to commit the time, resources and investment necessary to do the proper job," Christie emphasizes.

"Too often, marketers give lip service to an integrated marketing/advertising process, but aren't willing to invest in it or listen to what the results tell them," he says.

"Clearly, the return-on-investment results demonstrate that making a well-conceived investment which is properly pre-tested and evaluated will pay handsome dividends." □

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Listing Additions

The following focus group facilities were inadvertently omitted from the 1990 Directory of Focus Group Facilities:

Equifax Focus Group Center
 Mack Centre II
 1 Mack Centre Drive
 Paramus, NJ 07652
 Ph. 201-599-0755
 Contact: Audrey Weiss
 1,3,4,6,7B

The Viewing Room
 Div. of ASI Marketing Research
 2600 W. Olive Ave., #700
 Burbank, CA 91505
 Ph. 818-843-4400
 FAX 818-843-6889
 Contact: Jill Garner
 1,3,6,7A

The following is a correction to the 1990 Directory of Focus Group Facilities:

Gilmore/Northwest Surveys
 5322 NE Irving
 Portland, OR 97213
 Ph. 503--282-4551
 Fax 503-280-1130
 Contact: Yvonne Eby
 1,3,4,6,7A

Trade Talk

continued from p. 54

sure those customers are getting what they need from the research "service" within the company, as this passage discusses:

"People involved with an inquiry center must view all functional areas and staff groups within the organization as their clients or customers. This is a departure from the more limiting and common arrangement where the market research department treats the marketing function as its only significant client. This broader perspective is difficult to achieve when a firm has no in-house research expertise and buys all such expertise from outside. For that matter, it is not particularly easy even when there is an internal research staff. Many market researchers are closely tied to the market organization and have little incentive to develop other clients. Additionally, the demands made of research staffs leave them little time to cultivate other clients. This problem is often compounded by the marketing function's resistance to sharing market data."

Effecting change

Aware of these constraints, the authors begin the chapter "Implementing the Inquiry Center" with the acknowledgment that in most firms or organizations it is difficult to effect change—and especially a fundamental change—in the way an organization uses information.

Too much stands in the way—tradition, different learning styles, job boundaries, egos, budget constraints. The authors recommend incremental change, and call upon researchers or anyone within the organization who decides to champion the inquiry center to demonstrate the value of the concept to the rest of the organization. As the book states it, they must become "change agents."

That's a tall order for someone who, if he or she is like 99% of the rest of the people in the work force, is so swamped with day-to-day work that the thought of taking up the additional role of crusader is too much to handle.

For those who decide to take up the challenge, the book offers

plenty of assistance in determining how to best take the concepts and make them work within your company. The authors push the reader in the right direction by providing what they call thinker toys—"tools or devices to focus attention on current practices and thinking, and to examine the reasons why they should or should not be continued or modified."

For example, they offer six key questions to ask before trying to introduce organizational innovation that address the likelihood of success, the effects of the change on personnel, and the benefits. The first question is, "Have top managers agreed there is a need for the proposed change?"

Of further help, the book includes the statements of the policy of information use in Eastman Kodak and General Motors, the A VICTORY model—an acronym of the factors that have to be considered when trying to effect change—and other guidelines to assist the reader in implementing the inquiry center concept.

Sections analyzing learning and the exchange of information, in the context of the relationship between managers and researchers, provide insight to information needs and modes of interaction.

The chapter "Research-Use Technology" provides a procedure for increasing the value of research to managers and includes the seven deadly obstacles to the effective use of research, from post-survey regret ("I wish we had asked...") to pseudo-clairvoyance ("I could have told you that").

"Developing Analyses and Breaking Through Biases" discusses a number of problems related to data analysis, and in its appendix shows examples to enable the reader to identify and understand some of the mental obstacles he or she may encounter within the company.

I can't say whether the "system" will work and what the ultimate rewards will be—that depends on how well your organization understands the "how" of information use—but "Hearing the Voice of the Market" presents a strong case for making the effort to find out.

"*Hearing the Voice of the Market*" (294 pages, \$29.95) is published by the Harvard Business School Press, Boston, Massachusetts 02163. □

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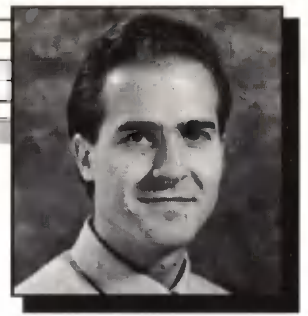
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by Joseph Rydholm
managing editor



New book's "thinker toys" promote effective use of information

Does this quote hit home? "Knowledge about the 'how' of information use is inadequately developed and poorly applied in very nearly all private and public sector organizations."

If it does, you may want to investigate its source, a new book called "Hearing the Voice of the Market: Competitive Advantage through Creative Use of Market Information."

Combining a textbook's theoretical approach with a how-to book's practicality, co-authors Vincent Barabba and Gerald Zaltman have created an interesting hybrid. Barabba is currently executive director of market research and planning at General Motors, and he has worked in similar positions at Xerox and Eastman Kodak. Zaltman is professor of marketing at the University of Pittsburgh.

In the course of outlining a system for firms and organizations that want to use information more intelligently and creatively, the authors explore a number of concepts and ideas, but ground them in a recognizable

context to avoid spiraling off into abstraction.

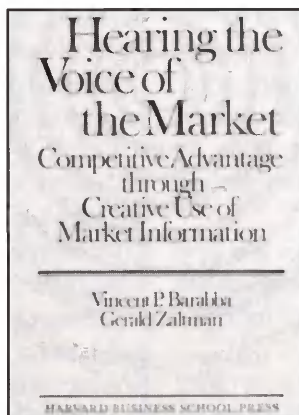
Thus while presenting models of information use they also discuss the practical hindrances to their adaptation and use in the day-to-day setting.

Inquiry center

The main model of information use outlined in the book is the inquiry center, defined as "the ideal mindset in a company for effectively and efficiently reconciling the voice of the market with the voice of the firm." The authors leave the concept loosely defined in the belief that ideas have a better chance of being adopted if "they can be easily adapted to the real lives of those who will use them." Rather, they discuss the component parts, physical and psychological, that make up the inquiry center ethic.

The inquiry center builds on the oft-repeated idea that within any company or organization there are internal "customers," and that it is important to make

continued on p. 53



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Project Coordinator, General Foods

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Manager, Consumer Research, Heinz

6. Fantastic and on-track! The manual will be a great addition to our reference library! Priceless! So well laid out. Speaker excellent, interesting — on-track.

Product Researcher, Midmark Corporation

7. The best (seminar) I've attended. Outstanding association of statistics to marketing research problems. Linked statistical background of MBA to steady concerns I face everyday. (The speaker) explains statistics and methods better in 2 days than most professors have done in a semester of undergrad and grad work.

Business Research Analyst, Dow Chemical

8. Fantastic! Even though I have an M.S. in stats I have never had such a clear picture of how to apply stat techniques before. Wonderful examples to explain the theories, ideas, philosophies—superb (speaker)! Helped to motivate me to expand my use of different techniques and explore more possibilities.

Marketing Research Analyst, Consumer Power Company

9. "Intensive" is an understatement! But, I sure feel I got my money's worth. I got everything I come for, and more. Incredibly helpful and useful information. Terrific workbook. Unique instructor . . . someone who can "do" and "teach". Wonderfully enthusiastic.

Principal, Creative Focus

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