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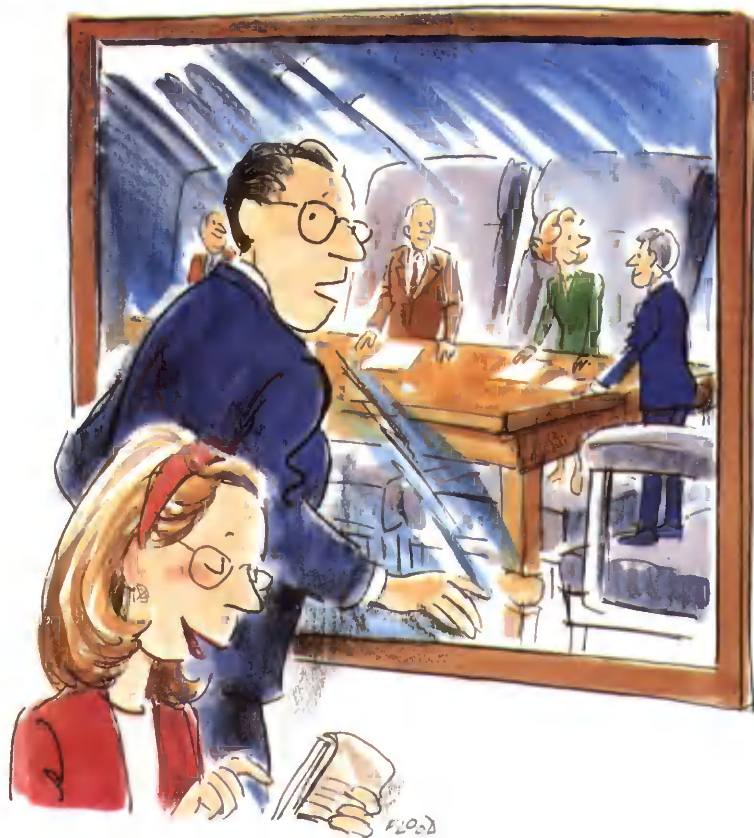
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Advertising research issue

March, 1993



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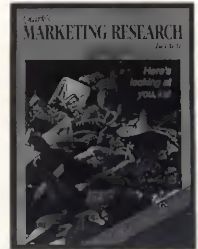
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### Cover

Ad research helped Keep America Beautiful develop a new PSA to replace its long-running anti-littering campaign. Photo courtesy of Keep America Beautiful.



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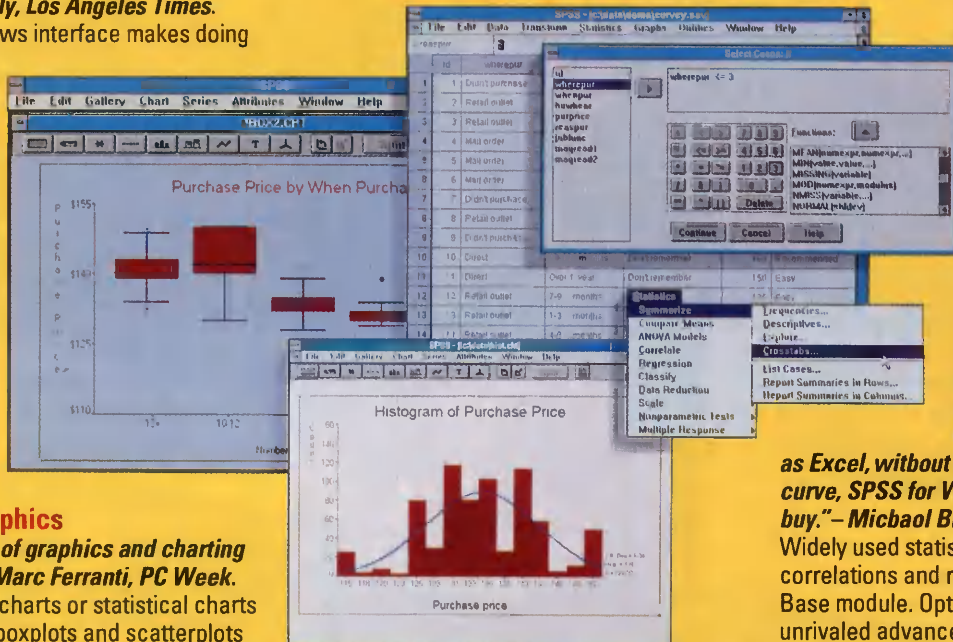
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# SPSS



# Here's looking at you,

If they ever build a TV commercial Hall of Fame there will surely be a space reserved for Iron Eyes Cody. Cody—you may remember him as the “Crying Indian”—was the “star” of the long-running public service announcement for Keep America Beautiful, Inc. (KAB) that ran on TV stations across the country during the 70s and 80s. Few who saw the commercial could forget its image of a single tear crawling down Cody's face as he reacted to the actions of litterbugs.

Effective though the spot was, it became outdated as the larger issue of waste management eclipsed littering in the public consciousness as the nation's top garbage-related problem. When Keep America Beautiful—a national non-profit organization dedicated to improving waste handling practices in American communities—set to developing a new PSA to address the problem of waste management, it had to answer the question: How do you duplicate the impact of the “Crying Indian” spot?

With the help of research, KAB and the Stamford, Conn.-based ad agency Rotando, Lerch & Iafeliece developed a spot that just might do that. (All of the those who worked on the spot, including Pytka Productions and Rotando,



Lerch & Iafeliece Advertising, donated their time and talents.)

## **Surrounded by garbage**

The central image of the new KAB spot, which was sent to 1100 broadcast and cable outlets in January, is a shot of a baby surrounded by mounds of garbage. The commercial begins with a close-up of the baby and pulls back to a wide shot as actor Michael Douglas narrates over the strains of “America The Beautiful.” “For future generations, our country is leaving behind our knowledge, our technologies, our values...and 190 million tons of garbage every year. Recycling alone just can't do it. Keep America Beautiful is an organization that can do something. We have solutions that have worked in cities and towns across the country. What can you do? More than you think!” Viewers are then invited to contact KAB for a free booklet. One version asks them to write to the address on the screen, the other flashes a toll-free number.

## **Broad appeal**

In one-on-one interviews with consumers to test the ad concept KAB found that the image had broad appeal, says Jeff Francis, director of communications, Keep America Beautiful. “We

## kid

*Keep America  
Beautiful uses  
one-on-ones to  
test replacement  
for long-running  
TV spot*

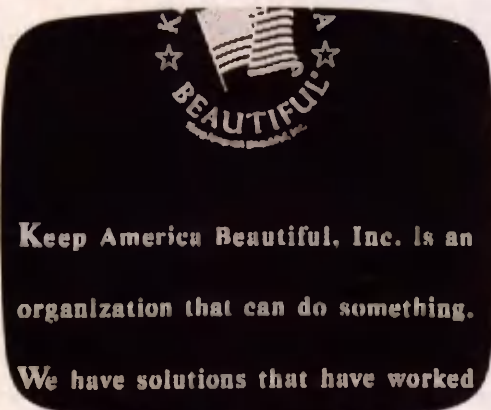
by Joseph Rydholm  
Managing Editor



Michael Douglas voiceover with *America the Beautiful* under: For future generations, our country is leaving behind our knowledge, our technologies, our values...



and 190 million tons of garbage every year! Recycling alone just can't do it. Keep America Beautiful is an organization that can do something.



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showed them a tape of the idea and then talked about it. We found that the baby appealed to everyone. It was an image that, no matter what your age, your sex, if you have children or not, no matter

what category you fall into, there was an emotional attachment to that child; which was good because we wanted this ad to be very broad based and hit as many constituency groups as possible.

The interviews helped make up our minds about using the baby and the fact that it did appeal to everybody."

continued on p.

# Dialing for dollars

*PBS station tests direct mail pieces with dial response measurement system*

by Joseph Rydholm/Managing Editor

If you're a fan of public television and/or radio, the words "pledge drive" probably strike fear into your heart. Pledge drives are an unfortunate necessity for public broadcasting entities, which depend on viewer and listener support to fund their programming and day-to-day operation. Audiences don't like them because they seem to go on forever and they foul up regular program schedules; the broadcasters don't like them because they know they're trying their audience's patience as they hammer away at them to start or renew their membership. In addition, it's difficult to find new ways to beg for money year after year.

For many stations, a less painful alternative or supplement to the pledge drive is the direct mail appeal. A PBS station in the Phoenix area, KAET-TV, uses a direct mail package to ask lapsed members to renew their involvement with the station. To pre-test the effectiveness of its appeals, the station late last year used MACH 2, a dial response system developed by Behavior Research Center, in four research sessions with groups of lapsed KAET members.

## Dialing in

Like other group response measurement systems, MACH 2 allows each participant to privately give his or her response to a question by "dialing in" the answer using a hand-held controller. Marketers watching the proceed-

ings are able to see the responses displayed in real time on a video monitor and add questions based on those responses. (See accompanying article for a more detailed explanation of group response measurement systems.)

The research was conducted by Behavior Research Center-Phoenix and The Direct Marketing Laboratory, Phoenix. Arnold Schwartz, president of The Direct Marketing Lab, says he saw pre-testing as a way to improve the direct mail process, which usually relies on response rates from test mailings to measure the success of a mail package.

"Although you know from your mail test whether you have a winner or loser, many times you don't know why, or what to do to improve your test. So it seemed to me that direct marketing had come of age to the point where it would be productive to pre-screen test packages prior to putting them in the mail, so that when you test in the mail the question isn't, 'Do I have a winner or loser,' but, 'By how much will it win?'"

"Using the MACH 2 technology we developed a pre-screening methodology for direct mail pieces. Respondents hold a ten point dial in their hands and they use it to register their responses to multiple choice questions or as a scale from one to ten. We developed a system to test new packages against a control to determine the likelihood of beating it, equaling it or losing to it. Packages are evaluated on potential stopping power

of the components, the offer, and graphics. In addition, copy can be evaluated line by line. Furthermore, questions can be added as the research is going on as unexpected issues surface."

## Best of both

Through the research, KAET was able to test two mail pieces and determine which was strongest. In the end, based on the research findings, the station has decided to combine the best elements of both packages, says Kelly McCullough, formerly viewer marketing manager with KAET, now with QED Communications, Pittsburgh.

"The two mailers were very similar in terms of graphic presentation and color. There were some different nuances in the copy, but they were very similar packages. When we walked into the test we were thinking, let's see if package A beats package B. When we walked out we said, well, package A wins but let's also integrate the positive aspects of package B."

The four sessions were structured this way: Each began with an introduction section during which respondents used the MACH 2 devices to enter basic information about themselves. This served to train them in using the technology. Next came the actual testing of the direct mail packages. The sessions finished with a focus group to elicit more open-ended responses.

"We added the focus groups for addi-





tional depth of diagnostic information, to peel back the onion a little more and allow room for spontaneous reactions that you don't get in quantitative," Schwartz says. "We found that although these were lapsed members, they were very loyal. They felt guilty about their membership lapsing. Some had lost their jobs or had another excuse, but they still wanted to be a part of the station."

#### **Avoid group-think**

The focus groups were also helpful, McCullough says, because they allowed the station staff to get individual responses as well as group responses, thus avoiding the group-think syndrome.

"You can get discrete information from respondents first and then get responses from a group within the focus group environment. As you know, in a focus group situation things can often be dominated by one or two people, and

I think you really avoid group-think with the MACH 2. I would liken some of the older research technology to Pong, and with this system we've moved into the Nintendo generation."

The respondents viewed the components of the direct mail pieces on slides. This capability gives marketers freedom to test rough executions of ideas before going to production, Schwartz says. "It gives you some leeway be-

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## Group response measurement systems aid in ad testing and more

by Jim Strelchun

*Editor's note: Jim Strelchun is vice president of marketing with Ortek Data Systems, Inc., a Beaverton, Oregon-based maker of response measurement systems.*

If you saw much of the TV news coverage of the presidential campaigns, there's a good chance you also got a peek at the results of some audience's blow-by-blow, graphed rating of a Bush-Clinton debate. The instantaneous results were provided by an electronic system that monitored and

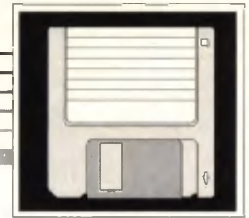
displayed the audience's voluntary responses during each second of the debate.

Audience or group response measurement systems (RMS), while known by a variety of names, all share a common purpose: find what the people in a gathering think about any issues or material presented and then display that information instantly. RMS products serve the insatiable demand for instant, actionable information found in virtually every application involving people in group settings, especially in market re-

search.

For market researchers and consultants, RMS can be a tool for enhancing the accuracy, quality and speed of primary research applications. Their use is increasing as familiarity, knowledge and confidence in them grows. Such factors as improved cost, technology and usability have contributed to the growth. RMS, which three years ago cost from \$15,000 to \$60,000, is now available for \$3,500 to \$20,000. Technological improvements have made RMS more dependable and reliable, and most no-

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## Multivariate and perceptual mapping with discriminant analysis

by Steven Struhl

*Editor's note: Steven Struhl is vice president, senior methodologist with Total Research Corporation, working in their Chicago office.*

**D**iscriminant analysis can give you highly useful multivariate or “perceptual” maps of many types, including a few that should be better known. These maps often neatly summarize large amounts of information and can provide particularly strong insights about which variables you are studying best differentiate between groups, while showing how these variables relate to each other.

### Discriminant analysis: a brief review

Discriminant analysis, as a reminder, was designed expressly to determine what best distinguishes or tells apart groups. This makes it an excellent technique for use in research, where we often need to address such questions as how cluster groups differ, what differentiates those “extremely likely” to buy from others with less interest, and so on.

This procedure requires one dependent or “grouping” variable. This variable must be categorical, of course, and not continuous as it can be in regression. You must identify each respondent (or thing you are analyzing) as the member of one group.

You can become quite creative about what constitutes a “group,” though, as long as no individual gets into more than one. We have encountered many original grouping variables—and sometimes invented a few. For instance, we came across a single grouping variable created from both age and income information. In this case, Group 1 was defined as those age 18-24 with incomes under \$35,000; Group 2 as those age 18-24 with incomes over \$35,000; Group 3 those age 25-35 with incomes under \$35,000, and so on. Another

original grouping variable divided respondents based on both their first and second favorite products in a category.

You can have a large number of groups, if your sample (and computer) will allow it. We have seen some analyses with over 50. With many groups, however, you should expect relatively low levels of correctly predicting who belongs in which group, although you can still get interesting maps.

### Discriminant mapping basics

Discriminant analysis produces functions, or equations, that combine the independent variables. Each equation looks like a regression equation, in that it combines variables additively with a weight or coefficient given to each. However, discriminant analysis does not try to predict some specific value of  $y$  from a combination of  $x$  variables, as in the familiar regression form:

$$y = a_1x_1 + a_2x_2 + a_3x_3 \dots$$

Rather, discriminant analysis seeks to differentiate most strongly among the groups identified by the dependent variable. It develops coefficients for each independent variable ( $x$ ) that lead to total scores ( $y$ ) for each respondent, with the goal of making the scores in each group as different as possible from those in all other groups.

To make matters more complicated, discriminant analysis can (and usually does) produce more than one function or equation. The number of functions is limited by the number of groups, or the number of independent variables—and must be at least one less than the smaller of the two. So, a discriminant model looking at four groups and fifteen independent variables could have up to three dimensions. An analysis looking at ten groups and seven independent variables could have up to six dimensions.

These dimensions are strictly independent of each other, and so in a map are shown at right angles. A map of the first

two discriminating dimensions would fall onto a standard x/ y plane. Three dimensions becomes difficult to plot, and more difficult to interpret. You can get four dimensions (more or less) onto a single map, by overlaying different colors for values in the fourth dimension onto a three-dimensional surface. Trying to get a client to understand a map like this is another matter.

Fortunately, in many cases, the first two or three dimensions identified explain most of the variance, or patterns of differences, in the data. Plotting these often lets you see everything important. This ability to combine many variables into "dimensions" can give you the next best thing to "looking into high-dimensional space." That is, you can see the effects of many variables at the same time, perhaps more easily than with most other techniques.

Discriminant analysis can also provide you with other information that can get displayed graphically. For instance, it shows how well each group has been identified, gives detailed information about how much groups look alike, and even can provide each respondent's likelihood of belonging to each group.

#### Point-vector maps from discriminant analysis

Sometimes you will see a discriminant map in which groups being analyzed are shown as points and the significant independent variables are shown as vectors. The points represent the averages (or centroids) of the groups on the dimensions shown. In the example following we will consider a map based on a survey questionnaire, with each variable being simply the responses to one question. The dependent or grouping variable identifies each respondent as a member of one group developed by a clustering analysis.

#### a. Putting respondents on the map

The group averages get plotted by using respondents' answers to each question contributing to a dimension. (Usually the "raw answers" get transformed into standardized form—that is, each variable is re-scaled to have a mean of zero and a standard deviation of 1). The contribution of each variable is shown by its coefficient. Let's suppose we have two variables that contribute to dimensions 1 and 2 as shown in the following table.

	var1	var2
dimension 1	.90	.10
dimension 2	.20	.80

Now suppose you have three respondents, whose standardized scores on variable 1 are 0.5, 0.6 and 0.7, and whose standardized scores on variable 2 are 0.2, 0.3, and 0.4. Their group average on dimension 1 would be:

$$.90 \times ((0.5 + 0.6 + 0.7)/3) + (.10 \times ((0.2 + 0.3 + 0.4)/3)), \text{ or } .54 + 0.03 \text{ or } 0.57$$

On dimension 2, their average would be:

$$.20 \times ((0.5 + 0.6 + 0.7)/3) + (.80 \times ((0.2 + 0.3 + 0.4)/3)), \text{ or } 0.12 + 0.24 \text{ or } 0.36$$

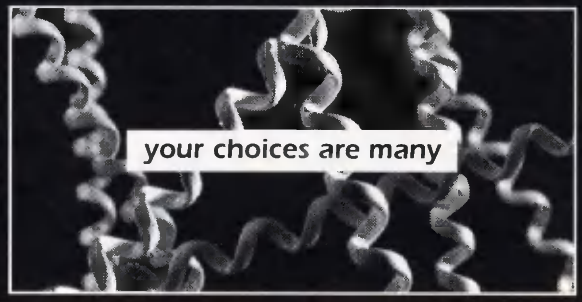
Therefore, the group average would get plotted at (.57, .36) on the map.

#### b. Putting variables on the map

Vectors representing independent variables can get drawn in any of several ways. Perhaps the simplest of these uses the variable's coefficient on each dimension to plot its location.

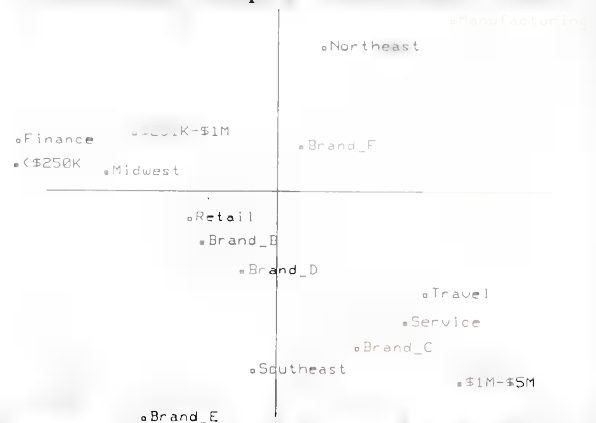
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For example, if a variable had coefficients of 0.90 on dimension 1 and 0.20 on dimension 2, its location would be (.90, .20), using the usual convention of showing dimension 1 on the x-axis.

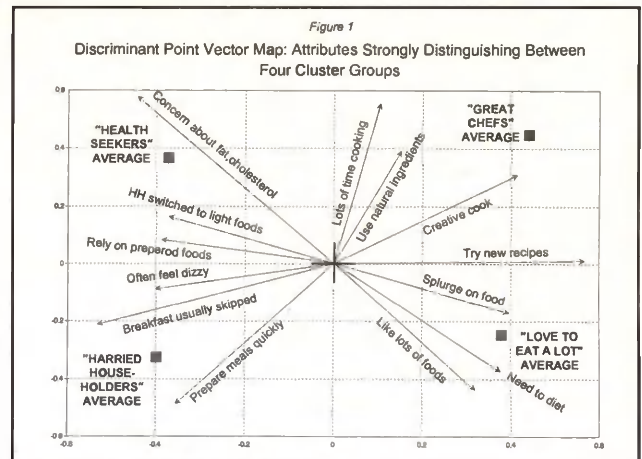


Figure 1 shows a point-vector map, with the variables and groups labelled. You need to decide on the group labels by examining the position of each group, and the concerns most strongly related to it. The variable labels simply reflect the questions asked in the survey.

One problem with this approach is that the group centroids, or averages, get larger—and so further from the center of the map—as more variables enter the discriminant functions. With a large number of variables (say, 50 or more), you often find the group centroids far beyond all the individual variable vectors on the map. Trying to plot everything together can lead to minuscule-seeming variable vectors that are hard to read.

Various solutions have been proposed to this problem, including multiplying the variable vectors by several types of constants. It is probably simpler to use a scale on the map that allows you to see the vectors easily, and then indicate where the group centroids would fall by drawing arrows to the edges of the map.

Interpreting the map is simple, once you have determined what was done to produce it. If the variable vectors have been left unchanged, then the length of each reflects its effect in discriminating on each dimension. Longer vectors pointing more closely toward a given group average, or centroid, represent variables most strongly associated with that group. Vectors pointing in the opposite direction represent concerns associated less with members of that group than other groups.

You can often label the axes in discriminant analysis, just as you would in factor analysis. Variables with long vectors in a given dimension, and particularly those with long vectors closest to the axis, have the most to do with that dimension. Looking at the variables that influence each dimension most strongly can often give you a name for that dimension.

However, you will sometimes find two or more “ideas” in a single discriminant dimension—unlike factor analytical dimensions, which tend to capture single ideas. This happens because discriminant analysis does not intend to group similar variables, but rather to find the combination of variables

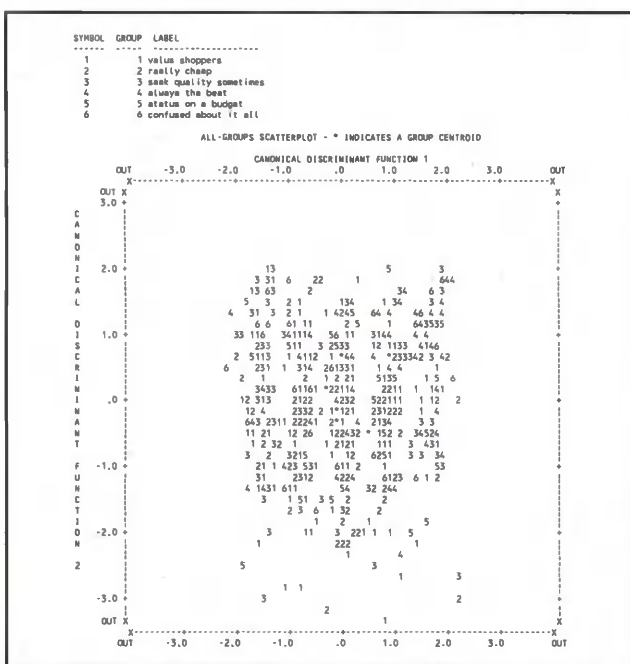
where responses best distinguish between groups of respondents.

Some authors have suggested plotting the correlations between variables and each discriminant function. This is possible, but creates some difficulties. Correlations measure similarities and not effects. Because variables usually are correlated to each other, as well as to the discriminant function, one variable will sometimes largely explain the effect of another. When this happens, a variable having a fairly high correlation with the function can have a small coefficient—its effects are largely redundant. Since the variable in this case would do little to distinguish between groups, it would be misleading to show it with a long vector. Most audiences expect variables shown with long vectors to have strong effects. This is not always true when you plot correlations.

I prefer using the correlations as a double-check when plotting the coefficients. If a variable has a high coefficient and a low correlation to the dimension (the opposite of the situation above), we would look carefully to see if its effects make sense in the context of the other variables. Sometimes you find that variables with high coefficients and low correlations with the axis are mostly helping to classify (or identify group membership) of a few respondents with strange response patterns. This is especially likely if the coefficient of the variable runs in the opposite direction from what you expect.

### The all-group scatter-plot

This type of plot shows how members of various groups fall on a pair of discriminant axes or dimensions. Sometimes, now that plotting software is quickly improving, you will

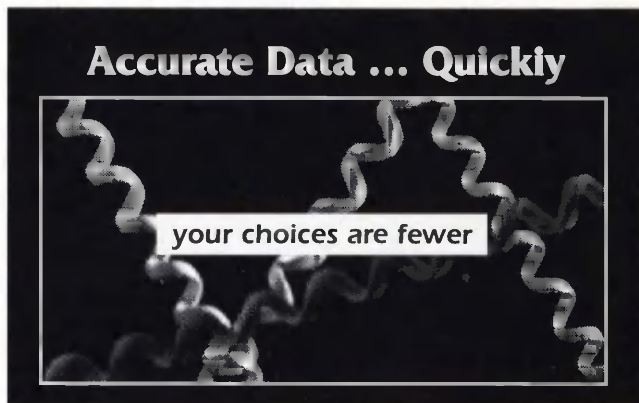


now see 3-dimensional scatter-plots. In our opinion, these can be highly impressive, but usually end up looking too

complex to help simplify data.

All group scatter-plots obviously provide a lot more detail about respondents than a simple group centroid or average, and can help you see how groups tend to overlap, or where they can most easily get confused.

In the example (Figure 2), the analysis produced 5 dimensions, so you would not necessarily expect to find clear structures in just the first two dimensions. What you see in this plot is something like the “shadows” of the six groups projected onto two dimensions from five dimensional space. Since this plot does not show three of the five dimensions, the groups could possibly be separated in a way we cannot see. However, if the first two dimensions explain all or nearly all



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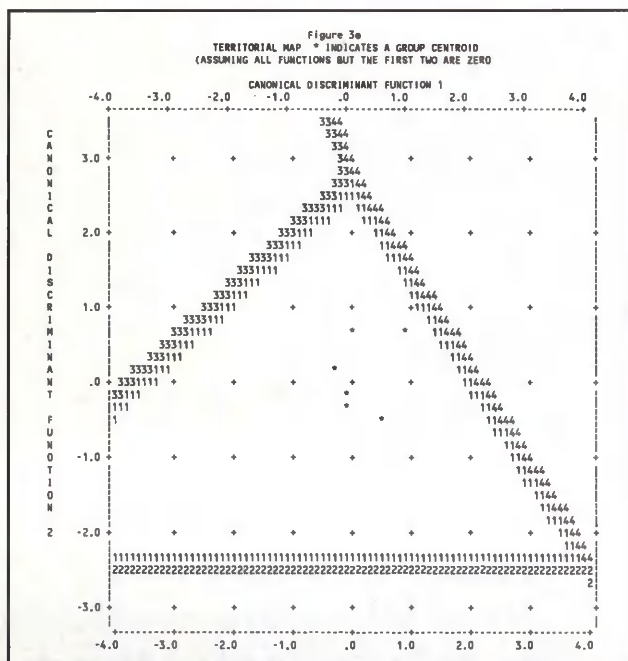
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of the variance in the discriminant solution, you would expect to see clearly-defined groups in the scatter-plot.

### The discriminant "territorial map"

#### a. What are territories?

This map provides a concise summary, but more information than a point-vector map about how groups differ on the discriminating dimensions. Based on the discriminant scores of the groups' members, this map shows regions, or territories, most strongly associated with each group. Each territory defines a "place" where you are most likely to find members of one group. Recalling that each dimension in discriminant analysis represents a set of variables that distinguish between



groups, you can see how respondents will get into a territory.

For instance, looking at Figure 3a, respondents with high scores in both dimensions are highly likely to fall into Group 4. However, respondents who have middling scores on the first dimension can have a very high score on the second dimension and still fall into Group 3. If respondents have very low scores in dimension 2, they are likely to be in Group 2 regardless of their scores in dimension 1. (We can see this last fact represented by the way the territory for Group 2 extends across the entire first dimension.) Finally, respondents with low scores in the first dimension and high scores in the second are very likely to be in Group 3.

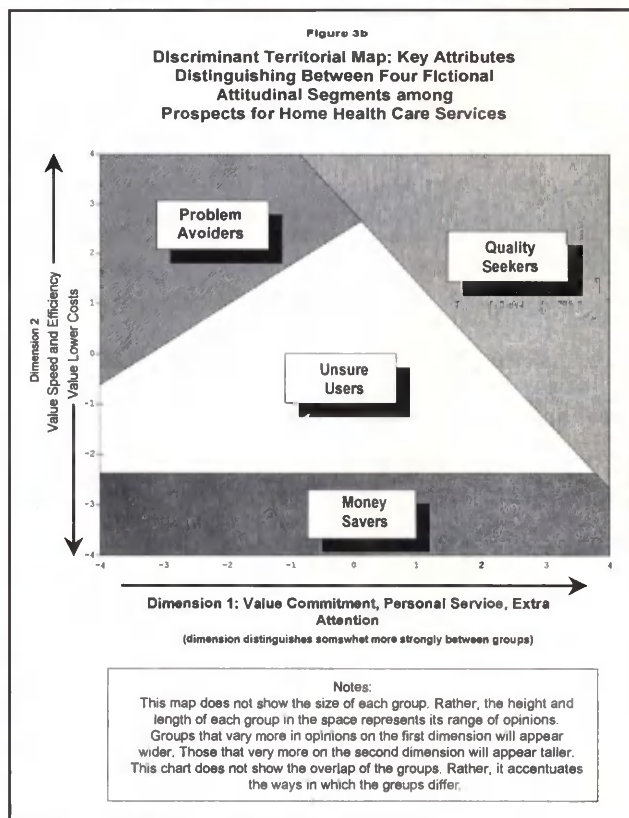
Crossing a line in the chart below brings you from an area where respondents are most likely to belong to one group into an area where they are most likely to belong to another. This type of map can tell you much more about how groups are similar and different than one simply showing group averages (or centroids). You see what combinations of discriminating variables (such as opinions, behaviors, perceptions) most strongly characterize each group and how extreme respondents' opinions must be for them to belong in a group.

#### b. Some cautions

These characteristics of the map may require some expla-

nation to audiences unfamiliar with this form of data presentation. For instance, the map does not show the relative size of the groups. Rather, the width of and height of each group represents its range of opinions. Width represents the range of opinions in each group on the first axis or dimension. Groups that vary more on the first dimension will appear wider. Similarly, the height of each group represents its range of opinions on the second dimension. The map does not show how much the groups overlap. Rather, it accentuates the differences between the groups.

Unfortunately, the map, as produced by available statistical programs, needs work before it becomes fully informative—as Figure 3a may make clear. You will need to label the dimensions by finding which variables contribute strongly to each. (As a quick rule, look for the variables that have both a relatively high standardized coefficient within, and some correlation with, the dimension.) You will also need to clearly demarcate the territories. The numbers running along the boundaries in the print-out show which group "owns"



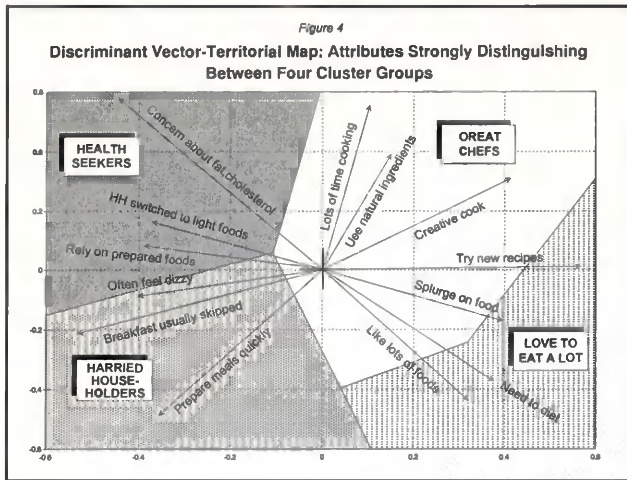
each area. Spending some time cleaning up the map (as in Figure 3b) can make this a highly informative and visually compelling summary of what differentiates the groups.

### Putting techniques together: the vector-territorial map

Overlaying vector for variables and territories for groups can provide an interesting summary of the data, and give more information than the simple centroid (or dot) that defines each group in a point-vector map. So far, while I have produced a number of these, I have not seen any from other sources. This type of map could well deserve more use. The example following (Figure 4) uses the same data as in Figure 1.

## Practical aspects of mapping

These maps are not yet as simple to create as a bar chart, but with advances in charting software they have become relatively painless. The basic data can come from any statistical program that performs complete discriminant analysis. SPSS,



Systat and SAS will give you nearly everything you need to do these maps, although (for now) SPSS is the only one that easily and directly produces a territorial map like the character-based (typed) figure 3a.

One problem with these programs is that they do not always produce the chart output you need for presentations. The

continued on p. 43

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# Qualitative ad research: walk like a researcher, think like a creative person

by Daisy Spier

*Editor's note: Daisy Spier is a moderator and head of Spier Research Group, Larchmont, New York.*

Advertisers and advertising agencies are always on the lookout for consumer trends. Marketing research helps them identify these trends. But interestingly, the trends we rarely think about are the trends within marketing research, and specifically advertising research.

One of the trends that is apparent today is the move to increased qualitative research due to budget and time constraints. Whereas qualitative research used to be used solely for developing hypotheses and options, now in many cases it has become the entire research process. If there is no quantitative follow-up, then it is the responsibility of the moderator to get more out of the qualitative research, to add to the educated intuition of marketing and creative people.

What sets great advertising research apart from mediocre research? How can we optimize qualitative strategic and diagnostic research?

Of course, the first step is to consider the objectives of the project, the nature of the product or service, and the target to whom the advertising will be addressed.

But equally important (and often overlooked), the moderator has to think like a creative person. Just as a moderator puts herself in the shoes of the respondents, she should understand the mindset of the writer and art director assigned to the project in question. That means you've got to appreciate what their job is, and how they do it.

In strategic development research, the moderator should ask herself, what does the creative person need to know and how will that information be used? How can I best learn and then communicate to the creatives what the consumer is all about? What his mindset is? How and why he uses the product? How his sense

advertising to test, the moderator has to appreciate that the creative person has digested a great deal of background information and miniaturized it into a 30 second commercial or a print ad—quite a feat when you think about it! What creatives really need is the hot button that moves people, that emotionally connects them to the product by creating positive feelings about the product and/or by what it can do for them or their self-image. What they don't need from researchers is long-winded rhetoric and a laundry list of consumer responses without accompanying analysis.

To accomplish this the following con-

*In strategic development research, the moderator should ask herself, what does the creative person need to know and how will that information be used? How can I best learn and then communicate to the creatives what the consumer is all about?*

of self is tied to the product? What sets the product apart from other products in the category?

In advertising evaluation and diagnostic research, when presented with

conditions should be met:

1. Select a moderator who understands the creative process—how strat-

continued on p. 38



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# Studies finds more proof that magazine advertising works

Two studies conducted by *Family Circle* magazine, Citicorp POS and Simmons Market Research Bureau have come up with some pretty convincing evidence of the effects of magazine advertising. The first, the *Family Circle* Advertising Impact Study, followed the buying habits of nearly 400,000 households in four metro areas during a 28-week period.

The advertising impact study measured the purchasing habits of two

groups, one group was exposed to the advertising in an issue of *Family Circle*,

ing single copy and subscriptions.) The purchases of both groups were moni-



the other was not. (*Family Circle* has a circulation of 5 million copies, includ-

tored over a 28-week period beginning on December 30, 1991. The period was broken down into three segments, a 12-week pre-period; a 4-week observation period; and a 12-week post-period.

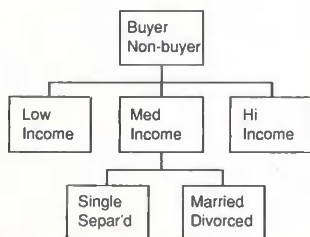
"The most significant finding is that magazine advertising had profound, significant, and immediate effects on sales of the advertised brand. In the past, we weren't credited with that," says Rebecca McPheters, vice president of Information Services at The New York Times Company Women's Magazines, the company that publishes *Family Circle*.

"In the late 80s and early 90s there has been a lot of talk about advertising accountability and so it seemed that given that the tools were available this was kind of the time to move the ball forward. The other thing that we were able to prove is that magazine advertising does reach people who are disproportionate purchasers of multiple product

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categories, which is consistent with what we had been hearing from syndicated research for a long time but it was nice to be able to validate that. So you have two effects: the audience effect that accrues from reaching people who are already predisposed toward a particular category and the ad effect which synergistically impacts on that."

**Study unique**

According to

the study reports, the study is unique in five respects because it:

1. Focused solely on the effectiveness of magazine advertising. It did not

involve intermedia comparisons.

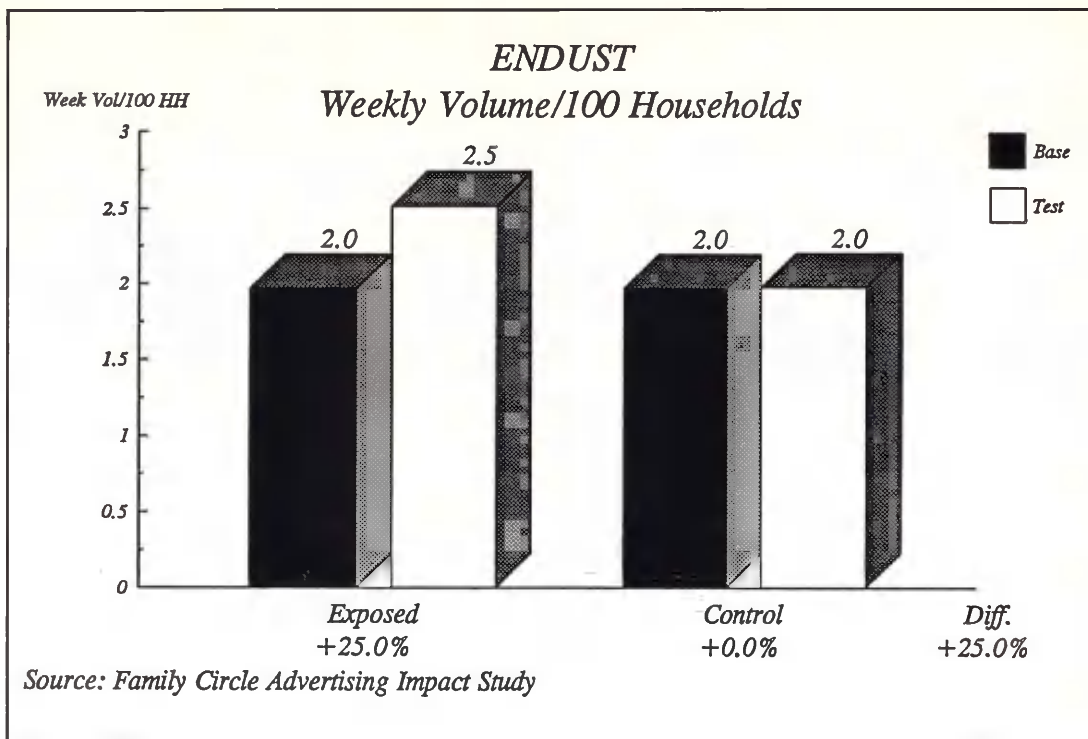
2. Measured actual behavior—rather than intent—at the household level.

3. Isolated volume effects among

households with known exposure to advertising.

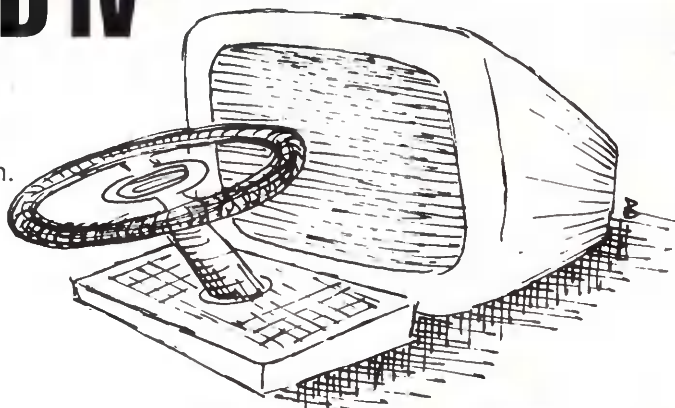
4. Did not measure the effects of

continued on p. 56



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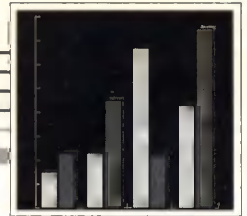
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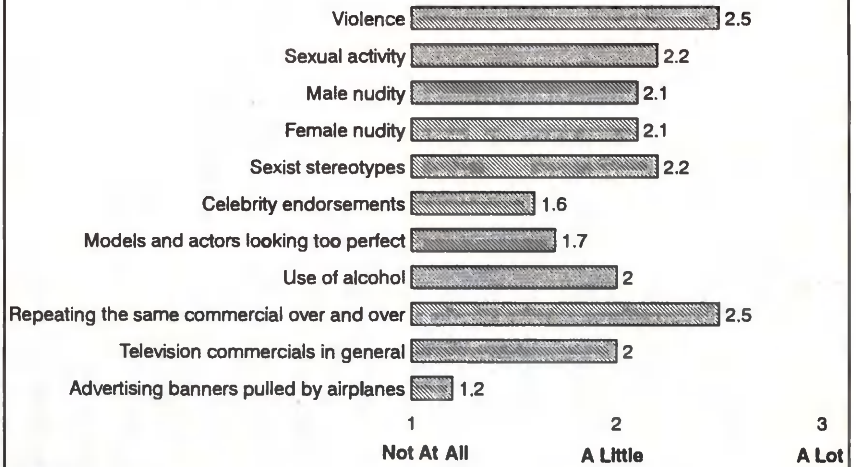


## Ad survey finds repetition a problem

Sixty-five percent of respondents to a Telenation survey on advertising said that repetition of commercials bothers them a lot. Telenation is a national telephone survey conducted by Arlington Heights, Ill.-based Market Facts, Inc. In the survey, respondents were asked to indicate if they were bothered a lot, a little, or not at all by the items shown.

In general, violence scored highly, as did repetition. For the most part, men and women were in agreement, but there were some notable differences. While both men and women were bothered a lot by repeating commercials (men, 65% and women, 66%), when it came to

### ADVERTISING: WHAT DO YOU FIND OFFENSIVE?



violence a much greater number of women were bothered a lot (76%) than were men (54%).

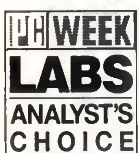
The sexes also disagreed considerably when it came to sexuality in advertising. More women were bothered a lot by sexual activity (63%) than were men (34%). When it came to nudity, women again were more inclined to be bothered. With regard to male nudity, 53% of women surveyed were bothered a lot compared to 36% of the men. Predictably, the women's reaction to female nudity was even higher. Of the female sample, 58% were bothered a lot by female nudity versus 27% of the male sample.

It seems that TV commercials are an accepted fact of life. Only 26% of the

continued on p. 34

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How do you like our service?  
 Very Satisfied  Satisfied  Not Satisfied  Dissatisfied

What is most important in selecting a vendor and how do we perform?  

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Service/Support	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5
Cost of use	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5
Price	0 1 2 3 4 5	0 1 2 3 4 5	0 1 2 3 4 5

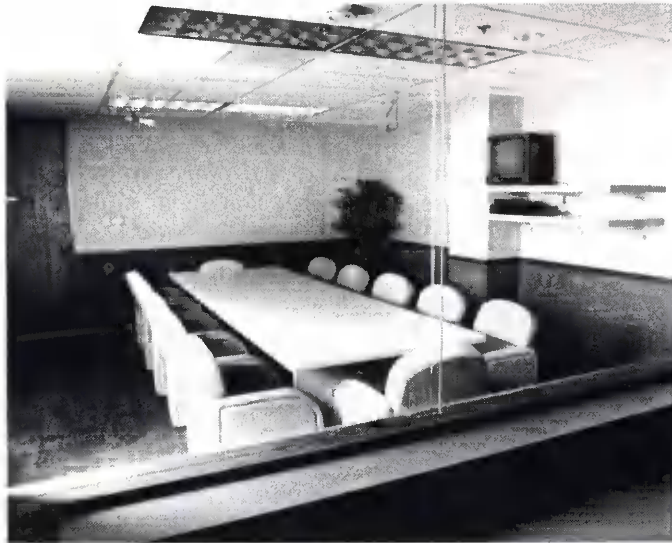
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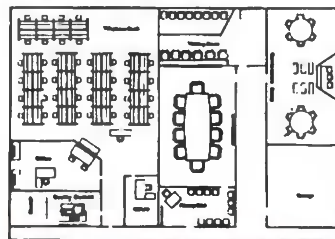
**Annio Sampogna-Reid and Chris Balthaser** manage The Research Center. They have over twenty years combined experience recruiting focus groups and central location tests in the Denver market. Their goal is to provide clients with the highest quality recruiting and the best facilities in Denver.

All recruiting for focus groups is conducted from The Research Center's **40-line telephono bank** (equipped with CRT and ACS Query interviewing software). The Research Center uses a duplicate number database system to help insure the highest quality recruiting.



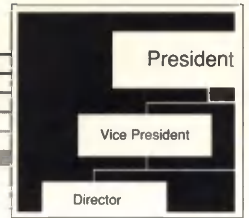
**The central location facility** is 24' x 24' and accommodates up to 50 participants.

The room is wired to provide audio and video feeds to the focus group viewing room. It features a raised platform and podium for the moderator and includes a built-in easel and wet bar.



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# NAMES OF NOTE

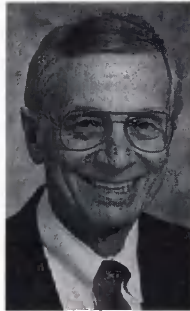


**Matt Hudson** has joined Raleigh, NC-based *Harker Research, Inc.* as vice president.

**Renee Fredman** and **Michael Hilton** have each been promoted to the new position of vice president with *Marketing Horizons, Inc.*, St. Louis. In addition, **Evelyn Talisnik-Misner** and **Lance Schoff** have joined the firm as project managers.

**Leslie Farris** has joined Van Nuys, CA-based *Interviewing Service of America, Inc.* as manager of CRT operations. In addition, **Polly Smith** has been named director of international research.

**Kenneth Radigan** has been promoted to vice president, director, Information Services, at St. Louis-based *Maritz Marketing Research*. In addition, **Jack Carew** has joined the company's At-



Carew



Mills

lanta office as senior account manager.

**David Mills** has also joined the Atlanta staff as an account executive.

**Kyle Ohm** has joined Minneapolis-based *Leon Tyler Marketing Research* as data collections director. She was



Ohm

previously research manager at Custom Research Inc., Minneapolis.

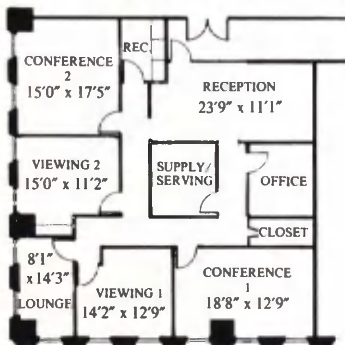
**Anne Horn** has been named associate research director at *Cramer-Krasselt* in Chicago.

**Rose Yuen** has joined Erlich Transcultural Consultants, Woodland Hills, CA, as a supervisor of Chinese research. **Jorge Cherbosque** has joined the firm's Spanish language qualitative department.

A new executive management committee has been named to direct operations at *Rockwood Research*, St. Paul. The committee consists of **Kevin Macken**, vice president-sales director; **Janel Mamer**, vice president-operations; and **Bill Etter**, vice president-research director. The change is a result of the resignation of **Dale Longfellow** as president of Rockwood.

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A new executive management committee has been named to direct operations at **Rockwood Research**, St. Paul. The committee consists of Kevin Macken, vice president-sales director; Janel Mamer, vice president-operations; and Bill Etter, Ph.D., vice president-research director. The change is a result of the resignation of Dale Longfellow as president of Rockwood.

Woodland Hills, CA, 91364. Phone 818-226-1333.

◆  
**Total Research Corp.**, Princeton, NJ, has opened Total Research Argentina in Buenos Aires to provide customer satisfaction measurement and quality management consulting services to companies that are active or expand-

ing in South America. Total Research Argentina will serve as liaison for clients of Total Research Corp., providing local coordination and facilitation of activities involving Total Research's product technologies. In addition, Johanna Dairies, Inc. has selected Total Research Corp. to provide customer satisfaction measurement and quality management consulting services.

◆  
**Brunetti & Associates**, a New Jersey-based research and data processing firm, has moved to new offices at: The Mall, Suite 217, 201 Rock Rd., Glen Rock, NJ 07452. Phone 201-652-6448. Fax 201-652-6318.

◆  
St. Louis-based **Quality Controlled Services** has been named a recipient of NCR Corporation's Supplier Excellence Award for 1992. The award was presented in December in New York by Todd Winniger, marketing research manager, U.S. Group Marketing Research. Accepting the award on behalf of QCS was Scott Waller, account manager.

◆  
**Erich Transcultural Consultants**, specializing in Hispanic and Asian research, has opened new corporate offices at 21241 Ventura Blvd., Suite 193,

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## Update of structural modeling software available

Los Angeles-based BMDP Statistical Software, Inc. is now shipping EQS 4.0, a structural equations modeling program. In addition to offering new and enhanced statistical and user interface features, the first version of EQS 4.0 runs under the MS Windows operat-

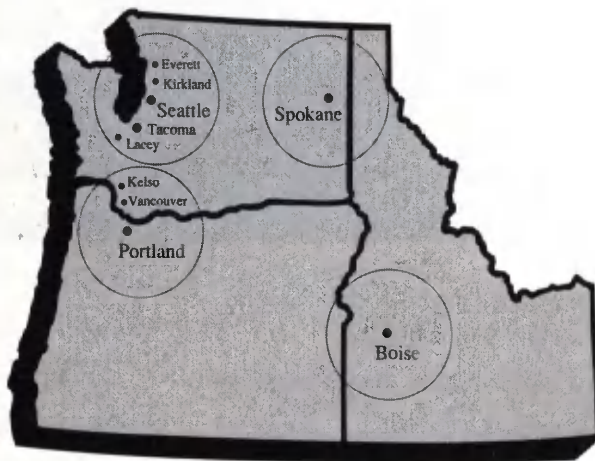
ing environment and is called EQS/Windows. Structural modeling is a multivariate analysis procedure for testing hypotheses about the causal influences among a system of variables. EQS 4.0's greatest increase in functionality lies in its intuitive and comprehensive graphical and exploratory data analysis environment. This environment permits visual exploration of single as well as sets of variables, imputing for miss-

ing values, recoding and transforming variables, and merging and joining data sets. In addition to providing standard univariate statistics such as t-tests, analysis of variance, and regression, the program now permits a fast factor analysis for latent variables with results that can automatically become modeling setups. Modeling is made easier yet with the debut of Build EQS, an internal system that automatically generates command lines for various EQS procedures. For more information call 800-238-BMDP.

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## Forecasts for new MSAs and U.S. counties from Woods & Poole

Woods & Poole Economics has released forecasts to 2015 for all newly defined metropolitan statistical areas (MSAs, PMSAs, and CMSAs). New metropolitan areas were defined by the Office of Management and Budget in December 1992. The Woods & Poole database for metropolitan areas has historical data back to 1970 and forecasts to 2015 for population by age, race and sex, employment and earnings by industry, personal income, household data, and retail sales by kind of business for every MSA, PMSA, and CMSA in the U.S. Data and forecasts for the newly defined MSAs are sold in the MSA Profile by Woods & Poole.

The firm has also released its detailed county economic and demographic forecasts on CD-ROM. It also contains historical data back to 1970 and forecasts

continued on p. 51

### ISA finds surveying ethnic markets has special requirements

Michael Halberstam, president of Interviewing Service of America (ISA), Van Nuys, Calif., has made available a recent report on ethnic interviewing based on his company's experience in this area.

Surveying ethnic groups is becoming more important as marketers realize they offer lucrative opportunities to sell more products/services. These groups do buy

shoes, own cars and want to be heard.

A specific example of the increased importance of these groups occurred recently when a 1992 survey of the Los Angeles metropolitan area by the *Los Angeles Times* showed that one-third of the 750 Koreans polled reported that their total family income was greater than \$40,000 per year. (The survey used bilingual, i.e., English and Korean, tele-

phone interviewers). Realizing the importance of this market the newspaper plans on more telephone surveys with local Koreans, and will also start research with Chinese and Vietnamese residents.

Requests for market research in the Asian American communities and in

continued on p. 53

### QFact helps researchers tap into profitable niches

Cincinnati-based QFact Marketing Research has developed a program to assist marketers in researching minority markets. Years ago the marketing profession equated "minority" with small consumer bases which were not sufficiently profitable to pursue individually. Now savvy marketers are racing to develop products and promotions aimed at ethnic niches. Armed with data from the 1990 census, marketers are beginning to realize the value of niche marketing.

An example is the African-American consumer base which currently represents 12% percent of U.S. consumers and which is growing at twice the rate of the population as a whole. A young niche, African-Americans currently bring to the marketplace spending power of over \$200 billion per year—a figure which experts predict will double by the year 2000. With the white "majority" (those of European descent) declining as a percentage of the general population, QFact notes smart marketers are increasingly turning to growth niches such as this to ensure future success.

#### Dispelled myths

The 1990 Census dispelled many myths which have, for years, kept marketers from seeing the African-Americans market as a viable niche. Not only did the census confirm that the market was sufficiently large to merit the atten-

tion of marketers, it also showed that African Americans possess the education, income and discretionary purchasing power of a viable niche. So why aren't all marketers flocking to serve

continued on p. 54

"They didn't just tell me how my customers felt about our service, they showed me how to improve it."

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## Keep America Beautiful

continued from p. 7

The interviews lasted about 30 minutes and included discussion of the ad concept and the issue of waste management. Since the ad was targeted at a broad cross section of people, the respondents came from a variety of backgrounds.

### Research worth it?

Francis says that from the start KAB considered doing some kind of qualitative research but the organization wasn't sure if it would be worth the investment. "It's a little bit expensive for the campaign we were doing but then we decided that it was very important. It's one of the best things that we did. It really gave us a lot of information that helped us get the right message for the PSA. I sat through all of them and so did the president of our organization. We learned a lot of information that we can take beyond the PSA. We're hoping that at some point we can do research just for our own marketing and communications because we learn so much about what consumers are thinking."

Grant MacDonald, senior vice presi-



dent, director of strategic planning, at Rotando, Lerch & Lafeliece, says the research informed the development process and helped define the substrategies of the spot.

"We did a lot of talking to consumers and prospects even before we got close to advertising to see what strategy we were after, what direction we wanted to go and how we could be compelling. We also talked to KAB reps around the country to find out what the hot buttons

were and what the barriers were that they confront in the marketplace.

We used that information to set up a strategy that talked about people's complacency. In order to get people to act we're going to have to confront them on a very emotional level and we set up a strategy that says that what you do today will affect future generations. That was the message we wanted to get across."

### Call to action

The spot is designed to function as a kind of call to action. In order to get them to take action, the respondents said that the ad had to offer something concrete. "We found through the research that a majority of people wanted to know what they were going to get if they were going to contact us," Francis says. "They really wanted something tangible. They wanted to know more than just 'more information'—that wasn't good enough, which is why we ask them to call or write for the free brochure. People want to take action, but at their own pace. Particularly at the outset, they don't want to get a call soliciting them for funds or donated time for a non-profit organization. They don't want to make that big of a commitment right away."

"We wanted to challenge people," says Grant MacDonald, "to ask them if they were going to do something. Looking at the baby campaign, people said, well I'm doing something already but maybe there's more I can do. It made them question their actions a little bit more, and that was the agitation we were looking for."

### Some hope

The research showed that the ad had to walk a fine line between being realistic about the scope of the problem and offering some ray of hope. If viewers felt helpless in the face of the problem, they could end up depressed and tune the message out, Francis says. "The whole tone of the ad was influenced by the research in the fact that the ad begins with a very powerful message which is

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actually a bit of a downer and then it ends with a hopeful message that there is a solution and you can be a part of it. That in large part was something that we always wanted to do but it was very much backed up by what the consumers said. Because if they felt that the problem was intractable then their typical response is, well, what can I do about it?

"There are a lot of PSAs being done on a lot of social ills, and we got statements in the research to the effect that a lot of people feel that these ills are so large that there's nothing they can personally do about them. That's one reason why in our ad we made a big pitch for personal involvement. Someone *can* make a difference. And that gets people motivated to want to get involved, because if there's no hope, then what can one individual watching the ad think that they can do? That was something very big that came out of that research. And it was definitely translated into the advertising."

#### Viewer complacency

The ad would also have to confront viewer complacency in relation to the waste management issue, caused in part by the success of local recycling efforts around the country. Some respondents said that because of these efforts the problem was under control.

"One thing we found that was very interesting was that because a majority of towns have recycling programs, people felt nothing more needed to be done to deal with the growing amount of garbage that we have every year. They felt that somebody else is taking care of it, 'We're recycling. What more can we do?' In the ad Michael Douglas says, 'Recycling alone just can't do it.' That line was in there as a response to what we heard from those respondents in the interviews," Francis says.

#### Testing 800 number

KAB is also testing the effectiveness of an 800 number through a ten state test of a version of the spot that asks viewers to call rather than write for the free booklet. Again, Francis says, the research helped KAB decide that an 800 number was worth a try.

"I think most people will tell you that

of course when you have an 800 number you get more response than if you have a 'write to.' We want to make sure that that is the case, particularly if we're going to spend the money on an 800 number because they can become quite expensive. We want to make it as easy as possible for people to respond to this ad.

"In the research, some people said

*"We did a lot of talking to consumers and prospects even before we got close to advertising to see what strategy we were after, what direction we wanted to go and how we could be compelling."*

they won't write. They would write if they had to, if they weren't given any other choice, but they liked the idea of the 800 number. That helped us because at the time we hadn't planned to do an 800 number and that helped us to decide to at least test one."

#### Lasting place

Response to the ad will be measured through calls to the 800 number or requests for the booklet. Its long term success remains to be seen. Only time

will tell if "The Baby" is able to join Iron Eyes Cody in the TV Hall of Fame and earn a lasting place in the viewing public's memory.

"The ad is targeted at all adult Americans, which for advertising is quite a large target market. But we felt that to get the most bang out of what we were putting into this PSA we needed to at least pursue that. And we found through

the research that it did in fact communicate to a large group of people. It appealed to everybody, and the main component that appealed to everybody was the baby," Francis says.

Grant MacDonald: "Part of our mission was to see what we could do to replace the Crying Indian. He was an icon. At the outset, we asked ourselves what other icon can we get long term? Well, I think we've found one that's pretty good." □

*"My research company applies multivariate analyses to give me information I can really use."*

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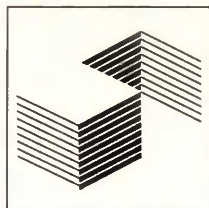
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## Dialing for Dollars

continued from p. 9

cause you don't have to go to full production if you want to test some alternatives. It offers a low cost way of measuring them."

### Other tests

McCullough says that seeing the system in action in the first session gave the station management ideas about other things to test. "After the first session we started thinking about all the different applications for this methodology, some of which we did not get a chance to use in the four sessions that we had scheduled. Namely, presenting video to the respondents, like pledge breaks, spots, promos, or whatever it might be, to get their feedback."

Two items they did test included program names and the respondents' interest in having the materials "sent" to them by someone associated with PBS. "We decided to ask, who would you like to get a letter from in the PBS world? Is it the local station management, program or membership managers? Or would they rather hear from the so-called PBS personalities. So we threw some names by them and got some very interesting responses."

### Hot button

In the line-by-line testing of the cover letter the research found that respondent interest levels went up when the text included the names of specific PBS programs, Schwartz says. "Whenever the letter mentioned specific programming the scores were very high and whenever the letter started with hard sell the scores went down. After the first session program titles seemed to be a hot button. So we added a question to get respondent rankings of 25 programs. In subsequent sessions other issues surfaced, such as funding and station management. As a result we added 60 additional questions. Despite the large number of questions, respondent boredom and fatigue weren't problems."

McCullough: "When the program titles would scroll by the men would respond very differently than women to specific programs. When *Great Performances* came up the female lines started to soar and the male lines start to fall. When *Motorweek* came up, the opposite happened. Some of it was predictable but it was quite wonderful to see the responses that the program titles received." □

## Group Response

continued from p. 9

longer require a programmer or "rocket scientist" to operate. Also, RMS is now capable of addressing more applications and providing real-time analysis.

### How are they used?

In conducting a typical research session with RMS, the moderator might ask the respondents to answer a question automatically displayed on a monitor. Respondents are directed, for example, to select their favorite soft drink from seven choices. If they preferred choice one (e.g., Coke) they would press the "1" key on their keypad, for choice two (e.g., Pepsi), they would press the "2" key, etc. The results are electronically collected, analyzed and displayed on a monitor. Answers to virtually any categorical or intensity-scale questions can be gathered speedily. It's not uncommon to execute an "electronic survey" of 100 to 200 questions, with any size of group, within an hour or so.

Somewhat more sophisticated than the "discrete" response mode is the "continuous" response mode, typically used for testing ads and live events. Respondents indicate their changing emotional reactions to a presentation or other audio/visual stimulus on a second-to-second basis by using a variable motion mechanism such as a dial. The dial motion is interpreted by the computer as a positive or negative scaled response. Since all devices are simultaneously sampled once a second, the group's mean response is displayed as a moving line graph, which may be recorded and analyzed later with the group.

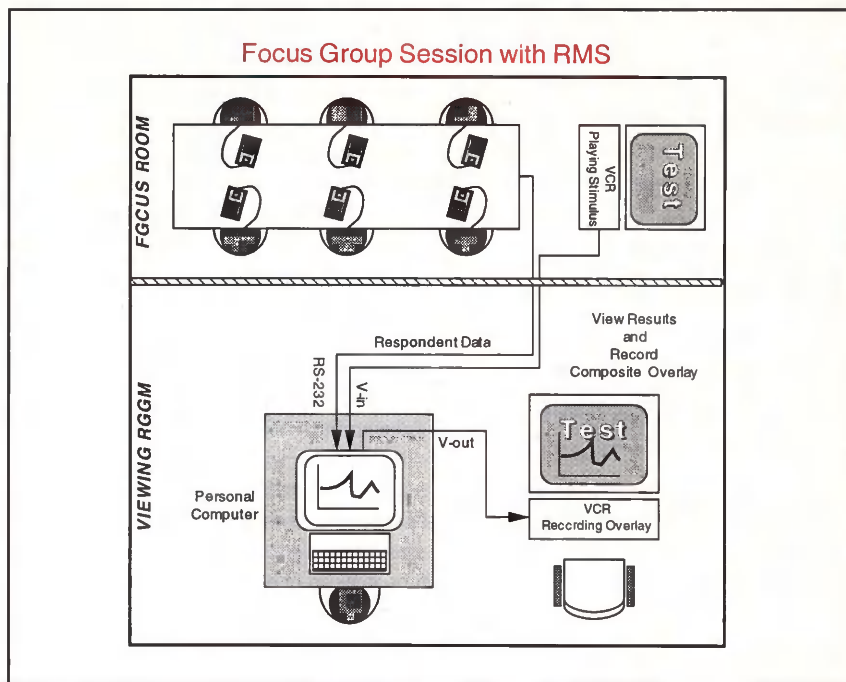
### RMS with the continuous response mode

Aside from simply collecting responses to categorical questions, RMS can capture respondents' gut reactions to every moment of a commercial or presentation. A group's mean response is updated and displayed within a second of their turning the dial on their responders, as their feelings change. This continuous response mode is about the only way a commercial or live presentation can be instantaneously rated by a group without the problems of distraction (from stimulus) or bias.

In applications such as ad testing or presentation rating, a graph of the

group's response is simultaneously merged with the video (stimulus) and recorded. Positive and negative scenes or lines, indicated by graph deflections, can be pinpointed immediately. The moderator then reviews the video overlay tape with the group and explores the reasons for their particular response at selected points.

ivate voting booth. Answers are non-verbal and anonymous, so RMS eliminates most of the typical group response problems that confront moderators, such as respondent reticence, group-bias, and group-think. When asked even the most sensitive or politically-charged questions, respondents can register their true feelings with complete confidence, with-



### Additional applications

When equipped with a responder unit in an "electronic focus group," respondents possess, in effect, their own pri-

out fear of recrimination or humiliation. No one respondent can bias or bully the group, and all answers carry the same weight.

The group discussion guide is gener-

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ally integrated into the RMS host computer in the form of a question/answer list. If the list is completely executed by the moderator, an RMS can guarantee that no desired information will be overlooked or forgotten. An RMS will also assure a 100% response rate for all questions asked.

Because the moderator has more time to focus on selective probing, RMS sessions can be more productive. Less time is wasted on bias-control and trying to extract an answer from each respondent for every question. Questions and choices are presented non-verbally, so the challenge of moderator objectivity is minimized. Instant displays of results help the moderator determine when and where to probe for more information. Follow-up questions can be created and executed, allowing for a flexible, interactive process.

An added RMS benefit is that all respondent information is stored in a database. A summary can be printed out at the end of a session and results can be reviewed quickly on a computer monitor. Thus, the need to sort, organize and analyze many pages of notes is virtually eliminated.

RMS can facilitate product related research projects by prioritizing product features, for example. Respondents might be asked to rate a series of features or attributes relative to each other; RMS can then provide relative scores and rankings instantly.

Some moderators are reluctant to use RMS in a focus group because they consider it intrusive; some fear the client's involvement as results are being displayed. Users, however, find that RMS can actually enhance the group. It can improve the overall quality and enable the moderator to elicit more information from the group. With direct input through their personal responder units, respondents get more involved in the process.

RMS, with its ability to support hundreds of respondents, can provide an economy-of-scale for certain quantitative projects; researchers can often conduct multiple sessions, consisting of larger "macro" groups of 30 to 60 respondents. Such projects require only the added overhead of placing more responders in a larger meeting facility.

Clients like the feeling of participation with RMS and the fact that they can see the responses of the entire group as the session proceeds. If there's a printer,

they can also depart from a session with something tangible: a complete summary of the group's responses.

## RMS technology and operation

There are three major components in RMS: the "responder" device, the "data collection" device and the control/analysis software. The attributes of these components and how well they're integrated into a cohesive system determine the RMS effectiveness and value for a given research application. The degree of portability of a complete RMS depends upon the size and quantity of responders and the style of host computer (e.g., laptop).

The responder is the mechanism used by each respondent to register an answer to a question. It's probably the most critical component, since it links the respondent's answers, thoughts and feelings to the RMS and the researcher. Responder devices range from a simple, hand-held electronic dial or button to a full computer keyboard with a dedicated personal computer. Generally, the more complex and sophisticated the responder is, the more difficult to use and confusing it becomes for any but the most technically competent respondents. This is particularly important in dealing with a broad range of respondents, from children to seniors.

The simple, telephone style keypad mechanism is non-intimidating and proves to be most effective for accommodating discrete responses. Simple, easy-to-read feedback methods such as a bright numerical display help respondents see their selections. Also, for darkened rooms, a back-lighted keypad may be helpful to respondents. In terms of physical size, smaller hand-held devices provide more accessibility and privacy for the respondent.

For an RMS that supports the continuous response mode, special response mechanisms such as a dial are integrated into the responder. While keypads may also be used for this purpose, the dial is preferred by researchers because of less respondent distraction and faster response speed. It doesn't require respondents to look away from the test material and possibly miss a pivotal scene in a commercial. Respondents simply rotate the dial right or left to indicate a positive or negative feeling.

Since response data must be simultaneously collected from groups consist-



ing of ten to even hundreds of respondents, it's necessary to have one or more electronic data collection units to perform this function. Each hand-held re-

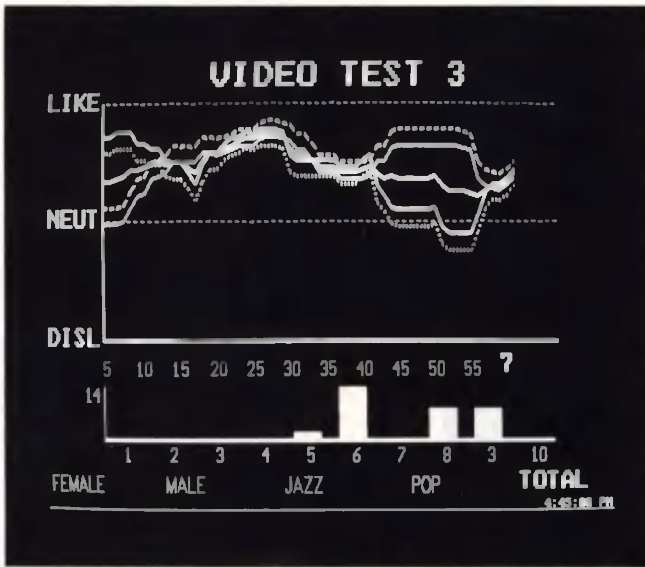
sponders are typically cabled to a data collection unit, which "samples" each one in turn using a multiplexing algorithm. Ideally, the responders are sampled for data at least once a second. The collected data is then sent from the collection unit to a host, personal computer (PC), generally through the serial communications port (RS-232), common to most PCs.

Software for the control of RMS, if included, normally resides on the host PC under some version of DOS. As with any software, the number of functions performed, applications supported, and its ease of use will vary widely and will ultimately determine how much you can accomplish. RMS software is neces-

sarily an amalgam of data acquisition, word processor, graphics, analysis and display processing functions.

### Summary

RMS has proven effective for both quantitative and qualitative research due to its anonymity, privacy, electronic accuracy, speed and instant feedback. Respondent candor and objectivity can't be guaranteed, of course, but RMS can improve the odds. While it's the dominant solution in some applications where there is no better alternative (e.g., ad testing), its typical role in most other research applications is to enhance existing methods. For a growing number of researchers and their clients, RMS is becoming a mandatory rather than optional tool in many primary research applications. □



Here is an example of how an RMS system displays results in real time.

sponder is typically cabled to a data collection unit, which "samples" each one in turn using a multiplexing algorithm. Ideally, the responders are

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## Survey Monitor

continued from p. 22

sample said they are bothered a lot by them, 45% felt bothered a little, while the remaining 29% were not bothered at all.

What did people think was the least offensive advertising? People were least offended (82%) by airplanes pulling advertising banners!

### Men prefer department stores for holiday shopping

When asked which stores they would shop most often for holiday gifts, a Maritz Marketing Research study reveals that department stores are favored more by men, while women prefer discount stores. Forty-two percent of males use department stores more often. In contrast, 47% of women choose discount stores over department stores. Men rank discount stores second. For study purposes, department

stores are defined as retailers like Sears, JC Penney, May Company, and Nordstrom. Wal-Mart, K-Mart, and Target are considered discount stores.

The study also shows the higher your income, the more likely you are to shop

of \$45,000 or more planned to shop most often at department stores, compared to 34% of those with incomes under \$45,000. Nearly half (48%) of the last group would shop most often at discount stores.

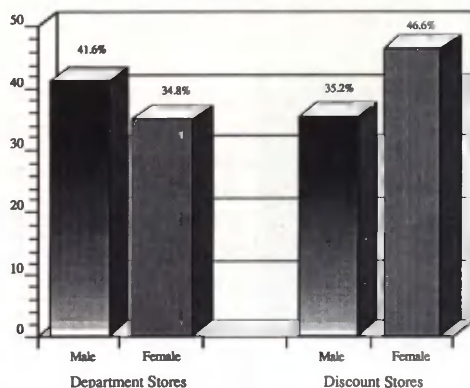
As a whole, the portion of shoppers who use department stores and discount stores is about equal. The stores consumers say they shop most often for holiday gifts are:

- Discount stores (41%)
- Department stores (38%)
- Specialty stores such as clothing, hardware, or toy stores (11%)
- Mail order catalogs (4%)

When purchasing gifts for the holiday season, most shoppers regularly choose items that are on sale. Six of ten either always or frequently buy sale items, while 34% occasionally buy them. Only 4% of shoppers never purchase items on sale.

The number of people always shopping sales declines steadily with in-

**Percent of Men and Women Who Shop Most Often At Department and Discount Stores**



at department stores for holiday gifts. Over half (51%) of those with incomes

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#### Demographics

- Asian-American
- Emerging Lifestyles of the 1990s
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- New Baby Boom
- Youth

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- Toilet Soap

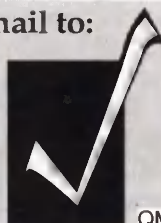
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spacious viewing rooms; client lounges; private telephones; large viewing mirrors; state-of-the-art audio and video equipment, and total security are standard. At select locations, we also offer FocusVision®.

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creased income. For example, 23% of those with incomes under \$25,000 always shop sales. That number decreases to 9% of those with incomes of \$55,000 or more. The study also suggests women are more likely to buy sale items than men. Twenty-two percent of females always purchase gift items on sale; only 12% of men do so.

## Most Americans believe ads contain subliminal messages

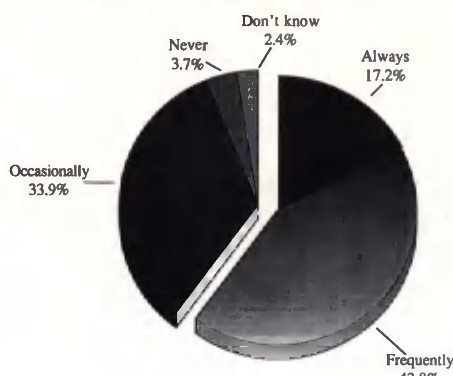
Although controversy surrounding the use of subliminal advertising has waned since the 1970s, a majority of Americans still believe that subliminal messages are being placed in advertisements. A national consumer opinion poll conducted in 1991 by Response Analysis Corporation, Princeton, New Jersey, on behalf of Seagram's Extra Dry Gin, found that six out of ten people believe that subliminal advertising is inserted into or is being used in advertisements.

A 1983 University of Maryland study showed that 81% of the general public

in the Washington, D.C. area believed that subliminal messages are used in advertising. Seagram's authorized the research to measure public attitudes to-

that camouflaged images are placed within advertisements to enhance the consumers' perception of a product or service. Survey respondents approved of the concept in advance: more than half (55%) liked the idea of spoofing subliminal advertising.

Americans Often Buy Gift Items On Sale



ward a planned advertising campaign that parodied subliminal messages and toward subliminal advertising in general. Seagram's Hidden Pleasures campaign was designed to intrigue consumers by spoofing the widespread belief

## Arizona Hispanics say they rely on Spanish media

The 1990 U.S. census estimates that nearly 700,000 Hispanics reside in Arizona. This makes the state seventh in the nation in terms of Hispanic population and fourth in concentration, with roughly one of every five residents of Hispanic origin or descent. Additionally, the Phoenix/Tucson consolidated metro area ranks third among western states in Hispanic population.

Hispanics participate as major players in Arizona's population growth and are increasing their numbers at a rate of 56 percent since 1980. And as this population grows, so does its interest in and reliance on Spanish language media,

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particularly the electronic media.

According to findings from two waves of Hispanic-TRACK Arizona, a study conducted by the Behavior Research Center, Phoenix, 88 percent of the Arizona Hispanic population relies on Spanish language television and 71 percent on Spanish language radio to meet all or part of their entertainment, music, news, or community affairs informational needs. Collectively, 93 percent use Spanish language radio and television to meet these needs. Only seven percent rely on English language media exclusively.

Even in bilingual households, only 13 percent rely exclusively on English language media for their news and entertainment. And despite some suggestions that younger Hispanics are turning to English language electronic media, this study shows little evidence to support such a contention—only nine percent of 18 to 34 year old Hispanics said they rely exclusively on English language media.

## Report outlines influence of advertising on kids

According to a new report by Find/SVP, New York City, advertising has a major impact on youths' purchases when it comes to breakfast cereals, fast foods, soft drinks, clothes, and salted snacks. However, advertising has its greatest influence on youths' selection of sneakers. When a study asked children to name their favorite car, 26% of them said Lamborghini, which retails in the neighborhood of a quarter of a million dollars. Today's children are becoming brand conscious at a very early age. There are several distinct reasons for this.

First, today's children shop more, and at an earlier age, than kids did in the past. They see something on TV, then they see it in the store and it just makes sense to them to buy it, or try to influence their parents into buying it.

Second, the increasing affluence of maturing baby boomer parents promotes brand awareness and consumer consciousness among their children. Also key is the grandparent factor. The average household income of the 55 to 64 year old group exceeds \$35,000, and grandparents are gift givers.

Finally, dual income households have become prevalent. While both parents

are away at work, teens and preteens are being given the responsibility of doing the shopping. While they may be told what product to buy, once loose in the store, they decide which brand of that product to buy.

The report also shows that 37% of 9-11 year olds, 49% of 12-13 year olds, and 54% of 14-15 year old children have their own television set. And anywhere from 33% to 40% of them are connected to cable. It is estimated that companies targeting children spent \$680

million on television advertising in 1991. Children's television advertising is being revamped and most of it now features lots of action, loud rock music, and famous rock stars and athletes—all of which have great appeal to kids.

There are also now more magazines targeted to children. In 1990 there were 160 magazines for children 8 to 14 years old, up from 85 such magazines in 1986. Ad spending on all children's print media was \$20 million in 1990, according to the Find/SVP report.



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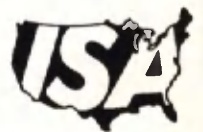
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## Qualitative Ad Research

continued from p. 16

egy is developed, and a campaign is developed. Ideally someone with agency experience will understand the needs of the creative staff. The moderator should be able to identify the mindset of the respondents and communicate it to the advertiser and agency. Not only what the reaction to campaigns or concepts is, but what is behind those reactions and why. Not only what works and doesn't work, but why, and what is more likely to work. A moderator who has been involved with the creative process firsthand will know what the creatives are interested in.

2. The moderator should take time before and between interviews or groups to talk with the creative team. While the marketing and marketing research staff usually clearly communicate the needs of the creative people, there is no substitute for hearing it in their own words. Talk about what they have seen and heard, and what they are interested in probing further.

3. The moderator must remember that in advertising you are not looking for mediocrity. No creative person wants to create strategically correct but forgettable advertising. The researcher's goal is to help create (by providing background learning), or identify and explain breakthrough advertising. The moderator should identify the core beliefs about a brand and help explain how

4. Select a moderator who can establish a rapport with the creative people so that they have confidence in the research. If the creative people don't feel the moderator is on their team, they will resist incorporating learning from research into the creative development. "I'm one of those oddball creatives who really love research," says Judy Teller, creative group head, Ally & Gargano

*The moderator should take time before and between interviews or groups to talk with the creative team. While the marketing and marketing research staff usually clearly communicate the needs of the creative people, there is no substitute for hearing it in their own words.*

far you can take those beliefs and stretch them before it destroys the credibility of the product or service. What every creative is striving for is excellence. The researcher must do the same.

advertising, "the qualitative kind, because that's how you find those sensitive, little-understood places in the consumer's mind or psyche that are just pure gold for enhancing the emotional

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value of your brand, refining the power of your ads. But, I've got to feel that the moderator understands what I'm trying to accomplish."

5. The moderator should be flexible in research design. She should be open to new creative ideas that occur in the back room while research is in progress. Isn't that what advertising research is for? Why not spend a few minutes exploring a new idea? It may be right on, and if it's not, at least everyone will

have learned something.

6. The moderator should remember that every word in an advertisement is precious. She should be sensitive to word nuances. She should keep in mind that the headline in a print ad must have the power to draw the consumer into the advertisement and that there are only so many words that can be included in a 30-second TV commercial.

7. The moderator should give time to the art and the overall tone and mood of

the advertising, in addition to the copy. Remember that creatives work as a team (art and copy) and that the whole ad is greater than its parts. If the ad is humorous, does the humor work? Why does it work?

8. The moderator should use the power of focus group interviews to help you understand the possibilities for your brand. Focus groups are ideal for providing insights for product positioning and advertising strategy.

9. The moderator must create an atmosphere that empowers each respondent to speak freely and must sense if this is not happening and sort out the responses. The moderator must have a sixth sense about people and whether or not they are being honest.

10. The moderator should always consider the individuals as well as the group as a whole when she is analyzing findings. The warm-up period serves a very real purpose and even though it takes up some time which could have been spent talking about your advertising, it does have value to you. It allows people to establish themselves as indi-

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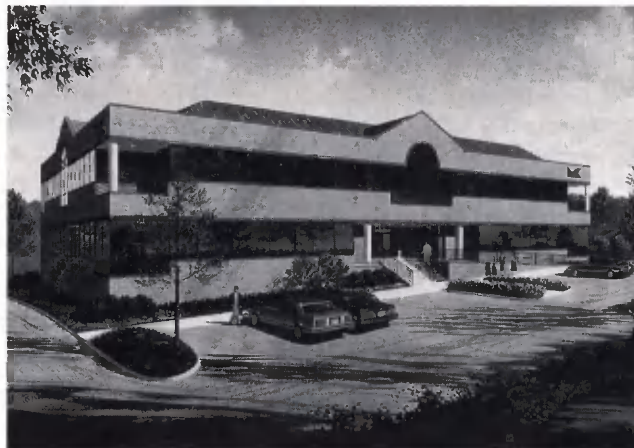
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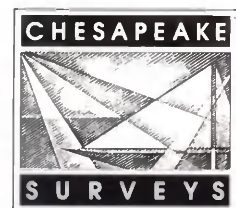
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viduals, to relax, to feel comfortable with their fellow respondents and to alleviate the anxiety that comes with fear of the unknown. It allows those in the back viewing room and the moderator to understand where that person is coming from and why he is saying what he is saying. It provides the context in which the information should be analyzed.

11. The moderator should read non-verbal as well as verbal cues from respondents. "Body language is important in focus groups. You can learn how a product is tied to somebody's self-esteem," says Eileen Friend, research director, *Reader's Digest*.

12. The moderator must respect the materials she is exposing to respondents and the creatives should respect the moderator and respondents by providing the highest quality of materials they can. If you expect her to read storyboards or concept boards to respondents, the moderator must do so in a way that is acceptable to the creative people without bias to any campaign. The storyboards or rough ads should be as detailed and clear as possible for the sake of the respondent and the moderator. The less the moderator has to explain the better so that each person receives the same stimulus.

13. Don't cut all the depth out of one-on-ones. Allow as much time as budgets permit. The lack of emotion that is frequently seen in one-on-ones is due to the fact that they tend to be shorter, the interview is more structured, the respondent has only the interviewer to "connect" with, and there is no group energy. There is little time for a warm-up as in focus groups. Very often after brief one-on-one interviews respondents ask, "Is that all?" and I realize that they are telling me that they have just gotten over their anxiety and are now completely at ease. What kind of information could we have gotten if we had five or ten more minutes of interviewing time?

14. Use one-on-ones when you want to expose people to advertising or positionings and get their comprehension without group influence. "Focus groups are wonderful up front but I

would never, never ever voluntarily use focus groups for exposing advertising," says Ally & Gargano's Judy Teller.

"One-on-ones are very useful to confirm understanding of direct mail brochures. For example, if you want to see if people can find the ordering instructions in a brochure and you want to be absolutely sure that people haven't learned from each other," says *Reader's Digest's* Eileen Friend.

15. It is the responsibility of the moderator to be absolutely fresh with each

respondent no matter how many have come before. Allow the moderator to set the schedule that she can work best with. Since sample sizes are so small, each respondent and his opinions must be given the respect they deserve. Peter Gassiraro, vice president, account supervisor, Weiss/Watson Inc. advertising, says, "The key to one-on-ones is a great interviewer; the problem is, it's exhausting work."

16. Finally, don't be a slave to methodological myths such as:

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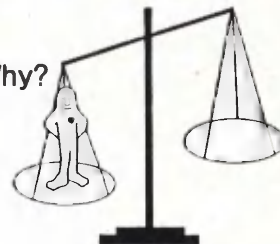
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"If one person hates the campaign then everyone in a focus group will say so and it will be killed."

"People are embarrassed to express their true feelings in a group, you never know what you're getting."

"There's always a leader who influences the group."

"One-on-ones are dull, boring, and lacking affect."

"There's no group influence in an individual interview so you get a true response."

"One-on-ones are too expensive per

interview."

"I can tell right away how many liked a campaign and how many did not in an individual interview. Groups are more ambiguous."

"It's easier to reach conclusions right then and there. You don't have to wait for the moderator's report."

Taken individually each of these comments are valid, but as an aggregate they paint a picture that could be misleading, and lead to decisions about methodology that may not be the optimal choice. Remember that there are always special

situations that require special solutions. Walk like a researcher, think like a creative person as you seek research solutions.

Barbara Levy, a San Francisco area moderator, suggests that "one-on-ones may be required when the people you need to interview are not concentrated in one area, and therefore you cannot recruit a full group to come to a single location." She has encountered this in projects she has conducted with professionals in high-tech fields. "Sometimes the respondents are so scattered and difficult to reach that I've conducted one-on-one interviews by telephone."

Certain categories and subjects may lend themselves better to individual interviews than to groups. "In high-tech, the end users don't know or care about certain things and are embarrassed to say they don't know. Similarly, high level people don't want to show their technical ignorance, so one-on-ones allow them to be more honest," Levy says.

In image-based advertising, such as is often used in service industries, I have found a combination of focus groups and one-on-ones to be very successful. For example, if you have a series of executions and you want to understand what they communicate, do some brief one-on-ones to establish whether or not the strategy is being communicated. Then, as a second step within the same project, follow these one-on-ones with a focus group. Here the objective is not communication, but whether or not the advertising is evoking the emotions and brand personality (imagery) you are seeking. The group will add dimension which does not always come through in individual interviews. "If the advertising is primarily image-oriented, as in the case of beer or cigarettes, then focus groups tend to draw out those emotions," says Weiss/Watson's Peter Gassiraro.

Occasionally, a client does not have the time, resources or inclination to conduct strategic research apart from execution research, so you have to get as much as you can from the research you are doing. You have to be creative in research design. When sequential research is not an option, a combination of focus groups and one-on-ones can provide the range of information you need. □

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## Data Use

continued from p. 15

character-based scatter-plot and territorial map would hardly be counted aesthetic wonders by your clients. While the Windows-based versions of SPSS and Systat, at the least, will get you close to finished appearance for some types of charts, all charting/plotting programs we have seen so far require you to do work by hand on most charts. No program will put labels along vectors, for instance, and few even will place labels next to (or near) points in scatter-plots.

We prefer to use programs that have powerful on-screen editing features as well as charting capabilities. Micrografx, for instance, makes a fine charting program that runs in the Windows environment. Many other notable competitors have emerged under Windows, so you may want to do some serious shopping. New programs are appearing all the time. Some will even allow you to trace over the character-based output that many statistics programs produce.

Those with more modest computers running under DOS might look into the GEM programs from Digital Research, which have fine on-screen editing and near-"WYSIWYG" ("what you see is what you get") capabilities. The GEM programs unfortunately have not been updated in several years, and have limited features compared to newer programs. They also have become harder to find. However, they run quickly and well, even on an old XT-type machine.

Among programs running in the Macintosh environment, we have read favorable reviews of DeltaGraph. This program has just become available under the Windows environment. Our informal tests show it to be promising but in need of some work. Like many Windows-based programs, it requires a powerful computer. Here too, you will want to shop around, since new programs and upgrades are appearing all the time. Macintosh programs as a class have a strong reputation for manipulation of graphical objects—exactly the type of software you need to create these maps.

Whatever your choice of software, with a little experimentation and patience, you can create maps based on discriminant analysis that summarize masses of information clearly and usefully. □

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The county, state, and metro area data includes the 1990 Census. The W&P forecast also includes the regional impact of the 1990-92 recession and the expected recovery in 1993-94 as well as the impact of military cutbacks on regions of the U.S. For more information call 202-332-7111.

## New syndicated service for magazine industry

Market Facts, Inc., Arlington Heights, Ill., has launched CMP/MarketScreen, a new syndicated magazine research service. The service uses Market Facts' demographically balanced "CMP" panel of over 360,000 households nationally as a sample frame. All members of a sample of 50,000 households will be screened as subscribers/newsstand purchasers of over 30 consumer magazine titles. Art Zarin, Market Facts-New York vice president, who has spent seven years supplying proprietary reader panels to the publishing industry, says that the service "allows subscribers to study competitive titles with custom panel research on a proprietary basis. It also has the ability to isolate and measure newsstand and readers across as many magazines as are measured." For more information call Art Zarin at 212-460-8585.

## Online database of company financial info draws from six major providers

Six of the world's major competing providers of company financial information have joined forces to set up Companyline, the largest integrated online database of its kind in the world.

The six companies, three of them American and three British, are Dun & Bradstreet, Moody's Disclosure, ICC, Extel Financial and Hemmington Scott (publishers of the Hambro Company Guide). Companyline offers direct access to the financial reports of 4.5 million companies in more than 40 countries. Credit ratings, brokers' analyses, directors' resumes, and a host of other corporate information also will be available and updated daily. This coverage of corporate information is being made

available worldwide through Market Analysis and Information Database (M.A.I.D.) Systems, a large online business information system.

Companyline is being fully integrated with M.A.I.D.'s existing services—Researchline and Newslines—which together provide users with immediate access via a standard PC and modem to more than 50,000 full-text quality research reports covering 450 market sectors around the world as well as business news from more than 4,000 news-

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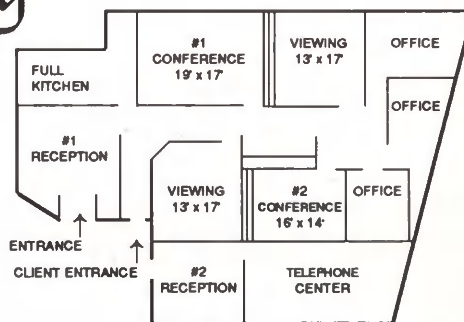
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## MMS offers new health care mailing lists

New mailing/telemarketing lists are available from Medical Marketing Service, Inc. (MMS), a Chicago-area health care list manager. The lists, drawn from the HCIA, Inc. database, include phone number, fax number, name, address, and title of the following key managers:

- Nursing homes—58, 429 key decision makers at 16,304 sites, selectable by size, licensure, ownership, services, and percent of patients who are "private pay."

- Retirement facilities—22,869 sites, selectable by facility type, ownership, and services offered.

- Medical rehabilitation centers—1,927 freestanding sites, selectable by facility type, ownership, and disorders treated.

- Alzheimer's disease treatment fa-

cilities and home health providers—3,233 sites selectable by number of beds, type of ownership, payor types accepted, services provided, and other characteristics.

- HMOs—491 sites, selectable by federal model type, tax status, chain affiliation, reimbursement mix, and other characteristics.

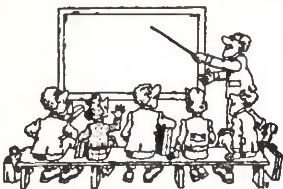
The lists are available on labels or magnetic tape or diskette for one-time use. For more information call Greg Hill at 800-633-5478.

## Catalog compiles "best of the best" in data analysis products

Statistical software supplier SPSS Inc. has certified a group of data analysis products and is offering them with a special guarantee in a new catalog, "SPSS Selects." The company says its reviewers have screened and tested the products for quality, utility, special and/or unique features, ease of use and value—so that all products in the cata-

log are unconditionally guaranteed on a 60-day money back basis. According to Jack Noonan, SPSS president and CEO, SPSS evaluates statistical products continually. Last year, the company decided to compile the "best of the best" of the industry's data analysis products into a catalog. Inclusion is based solely on the reviewers' judgment; a developer cannot purchase space in the catalog. SPSS staff members representing a variety of disciplines, including end users, statisticians and product designers, participate in the review effort. The first edition of the SPSS Selects catalog includes 14 products. Software packages range from easy-to-use survey design and memory-resident graphics to packages for easy data transfer, turning hardcopy graphs into numerical data and for merging large data sets into a single 3-D graphic. Also included are items such as OMR scanners and SPSS reference books. For a free copy of the catalog write SPSS, Inc., 444 N. Michigan Ave., Chicago, IL 60611 or call 800-841-0062.

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## Ethnic Markets

continued from p. 27

the Pacific Rim are expected to increase. The 1990 Census reports that there are more than 7.2 million Asian and Pacific Islanders in the U.S. This, in turn, breaks into more than 30 cultural subgroups.

The key factor for accurate interviewing with these ethnic groups is to have trained interviewers fluent in both English and the native language. According to information compiled by ISA only about five percent of first generation ethnic respondents will complete a call with a non-bilingual speaker.

The reasons for use of multilingual/multicultural interviewers include their ability to be aware of cultural, conceptual and idiomatic considerations when translating; in addition, these interviewers are able to thoroughly review surveys and translate to the native languages.

### Lower refusal rate

Overall, the refusal rate when qualified interviewers are used is lot less with Asian-Americans than with general market interviewing and other ethnic groups. The average refusal rate for telephone surveys is estimated at 35-45%. With Asian-Americans, the rate is about 22%. The lower rate occurs because Asian Americans are undersurveyed and they wish to have their opinions count. It's one way for Asians to become more "Americanized." There is the feeling that "Somebody is willing to listen to us" which hasn't been felt before. Until the last few years, the feeling among Asian Americans was that "Nobody's listening to us. We are not a big enough group yet."

### Posing questions

There are some unique techniques to use so that reliable data is collected. For example, ISA has found that Asian Americans have difficulty understanding varying degrees when presented in non-numeric form in a questionnaire. For example, a large telecommunications company surveying the Vietnamese market asked: "To what degree do

you like the telephone service? Excellent? Very good? Good? Fair? Not very good? Or poor?" The Vietnamese respondents had difficulty distinguishing between "very good" and "good." ISA found that using a seven point scale is a more effective method of obtaining the information.

Door-to-door surveying of Asian Americans is not a successful technique because Asian interviewers feel that knocking on doors is not polite. However, personal interviewing in

Koreatown (Los Angeles) or Chinatown (San Francisco) can be an effective method of collecting data.

When conducting ethnic focus groups there must be an awareness of the differences within cultural groups. An example would be Japanese Americans who have been in the United States for years as opposed to Japanese nationals in America for business. Moreover, men and women should be separated. Often, due to social customs, female participants will remain silent or not disagree

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if male respondents are present. Also, when non-native/non-bilingual interviewers are used Asian respondents are likely to hesitate in giving negative responses for fear of offending someone.

### Opportunities

Halberstam believes that ignoring the multicultural populations in the U.S. and international markets would be short-sighted. With today's telecommunications capabilities it is possible to access opinions worldwide, 24 hours a day. But the key to success is to have interviewers who are fluent in English and the language of the country being surveyed and who are also sensitive of the culture of the region being called.

Polly Smith, director, international research, ISA: "It has been demonstrated during the bid phase that in many cases it is less expensive to conduct research from Los Angeles than going to that country. Local tariffs, unaffordable exchange rates on the U.S. dollar, and the convenience of dealing with someone in your own language all contribute to this fact."

### Profitable Niches

continued from p. 27

this potentially lucrative market? Lack of understanding and awareness seem to be the keys.

QFact realizes that due to being culturally uninformed, many marketers don't fully realize that African-Americans are more than just "dark-skinned whites." In order to meet the unique needs of this consumer base, marketers must become more culturally sensitive. Different needs in areas such hair and skin care products, and different tastes in fashions and foods present challenges in terms of both product development and marketing approaches. Packaging and distribution needs must also be addressed. Further, a resurgence of pride in cultural values and heritage increase the need to better understand the African-American market.

Traditionally, when seeking to understand a target market's needs and preferences, marketing research has provided the answer. But, historically,

researchers have not always made sufficient efforts to learn about the unique needs of non-general markets. Researchers often lack the understanding of African-American culture and values to be able to ask the right questions and ask them in a way that will provide the information they need. Further, appropriate sampling may be hampered when respondents are asked to leave their neighborhoods to attend research sessions in areas that are not highly populated by people of their own culture or in locations not easily accessible.

Finally, respondent cooperation is often low due to a lack of understanding of how marketing research benefits African-American consumers since, in the past, they were often excluded from this forum.

### Culturally specific

Given the importance to marketers of understanding the needs and preferences of this potentially lucrative niche, QFact has developed TAP, Targeted Access Panel of African-American households



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in the Cincinnati and Dayton, Ohio markets. The goal is to provide marketers with African-American opinions on both culturally specific and general market products.

TAP is the result of work begun by Renee Ruffin-Price, QFact program developer, who determined that while general information on marketing to African-Americans was available little data on researching individual niches could be found. TAP is designed to meet client needs while minimizing some of the inherent difficulties in researching this consumer group. It has done so by taking a grassroots approach to reaching the African-American community. Working with ministers of African-American congregations—the center of this culture's family, religious, economic and social life—Ruffin-Price and her group are educating community leaders and consumers about the benefits of marketing research and the important role it plays in providing information on the products and services they want.

Panelist data includes information on household size, occupation(s), and use of various consumer products. The amount of data will continue to be expanded as the panel develops.

Even as researchers of color, Ruffin-Price and her team are constantly being challenged. They have found it necessary to come up with innovative ways to improve the process. One such innovation was the use of radio spots on local African-American radio stations to recruit panelists. While this technique would not be needed for general market studies, it is very appropriate for targeted recruiting. Another was the providing periodicals of interest to African-Americans in client waiting areas to indicate respect and cultural recognition of the panel members.

QFact believes that TAP is a successful program which provides a needed service for both clients and the African-American community by providing a culturally sensitive program which leads to better information, faster turnaround, and lower overall costs to the client.

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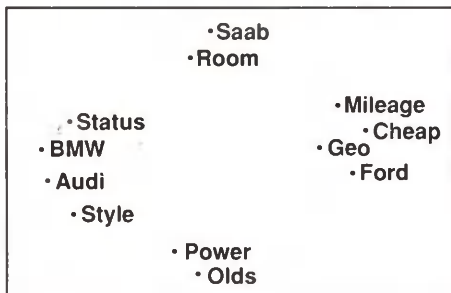
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Audi	10	40	90	40	80	0
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# FamilyCircle

## Family Circle Studies

continued from p. 21

advertising on either attitude or recall.

5. Did not rely on consumer perceptions of either advertising exposure or

of product purchase.

"Most other studies have dealt with changes in awareness, recall, intent to purchase, or perceived purchase and this study clearly wasn't about awareness or intent, it was about actual pur-

chase," McPheters says. "One of the things that we learned was that people's perceptions, for example, of frequency of purchase, are different from actual purchase behavior. When you're asking people what they have purchased within a one month or six week time frame, as many of the syndicated services do, it's difficult for people to remember...did they purchase it seven weeks ago or six weeks ago? There's a lot of room for errors in perception."

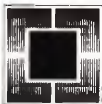
### Four metro areas

The study was conducted with consumers in four metro areas: Richmond, Virginia; Denver; Chicago; and South-



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*"Most other studies have dealt with changes in awareness, recall, intent to purchase, or perceived purchase and this study clearly wasn't about awareness or intent, it was about actual purchase. One of the things that we learned was that people's perceptions, for example, of frequency of purchase, are different from actual purchase behavior."*

ern California (Bakersfield, Fresno, Los Angeles, San Diego). Participants were chosen from shopper's clubs of the Von's Pavilion, Ukrop's, Safeway and Jewel supermarket chains.

The sample was generated using data from the Citicorp POS scanner database, which contains information on purchasing habits collected from participating households, who receive program benefits from supermarket retailers in exchange for allowing their pur-



chases to be tracked.

The scanner information identified households that had purchased a single copy of the April 21, 1992 issue of *Family Circle*. That list was checked against a list of subscribing households to identify subscribers. Of the households exposed to the advertising, 52% had purchased the single issue; 48% received their copy by subscription.

The non-exposed group was weighted to make it similar to the exposed group in terms of market, household size and income, age of the head of the household, and average number of weekly shopping trips. (While the study controlled for demography, it did not control directly for exposure to other media. However, use of Simmons information on the media consumption habits of *Family Circle* readers allowed the researchers to make some inferences.)

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*"These studies are good news for magazines and for marketers of consumer products. They provide hard data showing definitively that consumers respond to product advertising in magazines by purchasing more of the advertised brands. We feel we've broken ground in tying magazine advertising to clearly documented changes in consumer behavior."*

---

#### **Increased sales**

Nine brands that ran one or more paid four-color ads in the April 21 issue participated in the study. Overall, the study found that magazine advertising increased sales for eight of the nine

brands. This was demonstrated by:

- Absolute sales 22.5% higher among exposed households during the period of advertising.

- A rate of increase over base period sales 10% higher among exposed households.

One of the nine brands, Endust Dusting and Cleaning Spray, experienced a high increase in sales during the test period. In the first half of 1992, Endust advertised only in magazines. In addition to the ad in *Family Circle*, Endust

also ran ads in April in *Good Housekeeping* and *Parade*. Two additional Endust ads ran in the January 1992 *Family Circle* and March 1992 issue of *USA Weekend*.

During the 12 weeks before the Endust ad ran in *Family Circle*, the control and exposed groups bought Endust at the same rate. After the ad ran in *Family Circle*, the exposed group bought 25% more. During the post period, those who bought *Family Circle* continued to buy Endust at a 10% higher rate than

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those in the control group. According to the study report, "There was virtually no change in the Endust purchasing of the control group throughout the 28 week measurement period."

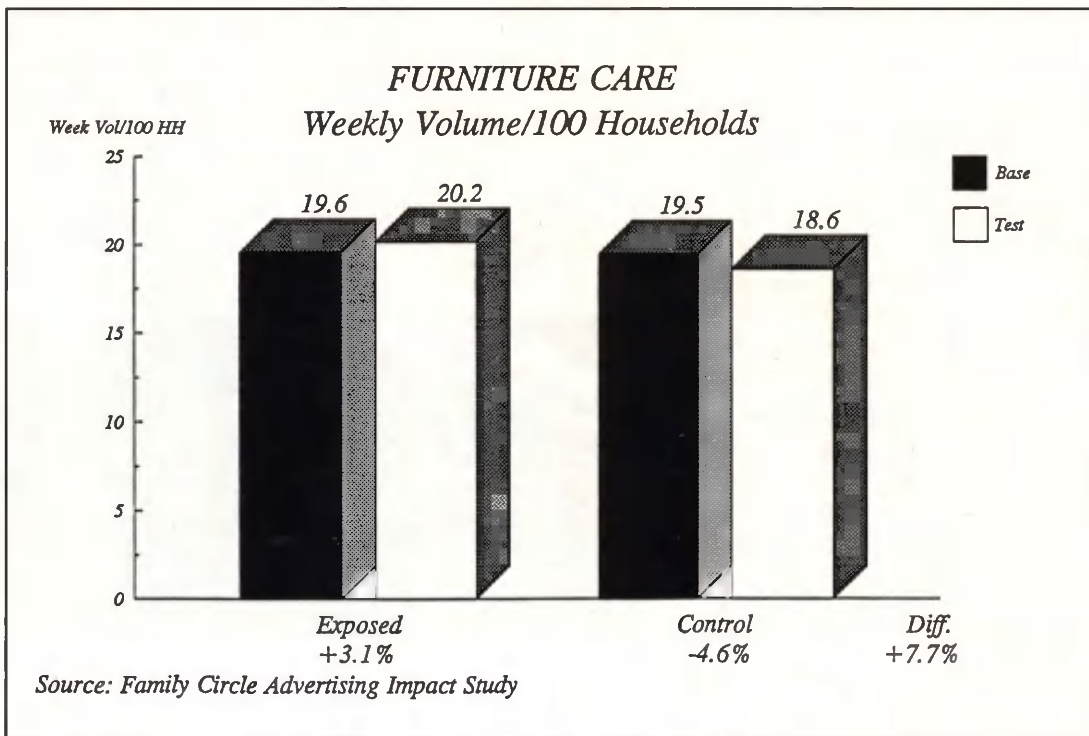
### Effect of coupons

The Endust ad featured a coupon, which may account for its effectiveness. McPheters says she suspects that coupons have an impact, but the study didn't measure coupon impact directly. A subsequent study may investigate that.

"I have the strong point of view that coupons make ads more effective. But in fact across the studies we've done we have only measured four ads with coupons. The Endust ad had a 75 cent coupon, which certainly would seem to have generated a high degree of consumer interest but

with only four couponed ads measured we can't generalize. Over time as we develop a larger database including more coupon ads we'll be able to address that

remainder of the budget went for purchasing space in six *Family Circle* and five other magazines, such as *Parents* and *Better Homes & Gardens*. During



more directly."

The study also tracked the impact of an ad for Nabisco Teddy Grahams. In the first half of 1992, approximately 65% of the advertising budget for Teddy Grahams was spent on television. The

pre-test period, households that were exposed to the ad in *Family Circle* purchased 10.6% more Teddy Grahams than the households who weren't known to have purchased *Family Circle*. In the observation period, the control households were outperformed by exposed households by 21%. In the 12 weeks after the ad ran in *Family Circle*, exposed households bought 20% more than the control households.

Both the Teddy Graham and Endust examples also show that advertising had an impact on sales in the products' respective categories. In the ready-to-eat cookie category, the study found a 16.7% sales differential between the exposed and control groups during the four-week observation period. Weekly volume per 100 households in the furniture care category was higher for the exposed group than for the control group through all three periods of the study.

### Awareness of advertising

The magazine study was followed up with 500 phone interviews with a nationally projectable sample of women

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to find out if women were aware that magazine advertising affected their purchase habits.

•58% of the women surveyed said that magazine advertising affects their purchase decision.

•Almost two-thirds (64%) said that magazine advertising affects their purchase decision even more than TV advertising.

•The respondents said an ad's coupons (86%) are most useful, followed by its recipes (81%), product information (77%), "how-to" tips (73%) and "education" (61%).

"We had the proof of magazine advertising effectiveness but we wondered if people were aware of it," McPheters says. "It was interesting that in fact they knew that it worked. They were asked about whether they responded to advertising in different media, they said they responded particularly well to magazine advertising."

#### Schedule impact study

Using a methodology similar to the Advertising Impact study, the second study, the *Family Circle* Study of Schedule Impact, tracked sales to 80,000 households over 68 weeks. It found that high frequency advertisers achieved significant sales gains that were maintained for the duration of the advertising schedule.

Other findings:

•Advertising schedules generated sustained sales increases for six of the seven brands measured.

•For the six brands, increases in sales attributable to advertising averaged 13 percent.

•The advertising schedules increased sales of the advertised product categories by five percent.

Of the seven brands tracked in the Schedule Impact Study, Spray 'N Wash Stain Stick was a top performer. The brand, which advertised three times in the magazine over a four-month period, saw its sales increase at a rate 37 percent higher among households exposed to its advertising in one or more issues than among the others. For its product category, the rate of increase was 15 percent higher.

"These studies are good news for magazines and for marketers of consumer products," McPheters says. "They provide hard data showing definitively that consumers respond to product advertising in magazines by purchasing more of the advertised brands. We feel we've broken ground in tying magazine advertising to clearly documented changes in consumer behavior.

"In the future, I expect that marketers will have the information necessary to calculate differences in the rates of re-

turn generated by various media and promotional alternatives. Manufacturers have a history of using systems like this to track promotions but they haven't used them as extensively to track the effects of advertising and certainly not the effects of advertising in magazines. At least now we know that if you advertise in magazines with enough consistency, you can not only increase your sales but you can also maintain that increase." □

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## LISTING ADDITIONS

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*Please note the following correction to the 1993 Directory of Focus Group Facilities:*

Due to an editing error, the listing for Catherine Bryant & Associates was placed under the Charlotte, North Carolina metro area; it should have been listed under the Winston-Salem metro area.

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## Trade Talk

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actually higher than the game average.”

Some other findings:

- 66.8% of the viewers said they find the Super Bowl commercials to be more interesting than TV commercials in general. In 1992, 55% held the same view.

- More people (35%) watched the game at a Super Bowl party this year than last (28.4%).

- 22.8% said they would be willing to shell out \$25 to watch the game on pay-per-view TV.

### Enough bang for the bucks

Over the years there has been debate about the value of Super Bowl advertising, with advertisers wondering if they're getting a big enough bang for all those bucks. Widi says that some marketers have learned how to do Super Bowl advertising right. "The advertisers understand now that the more you can link executions together into a campaign within the Super Bowl the better recall you're going to get and the better you're going to communicate your message."

Indeed, the poll found that some of the best-liked commercials were those of McDonald's, Lee Jeans, and Anheuser-Busch, all of whom ran multiple executions. "The campaigns that were strung together, for example McDonald's or Budweiser, those are the companies that came to the top in terms of score. Lee Jeans also did an excellent job this year."

Still, advertisers have to know what they're getting into—Super Bowl ad rates and budgets aren't for the timid. "I think there's a danger if you haven't bought a lot of time and you don't have a great execution. You can get lost. And I think we saw that with some of the advertisers," Widi says.

Widi breaks the Super Bowl ad experience into three segments: "You're either a household name and you buy a lot of time and you get real good recall, or you come up with some real creative executions and you get real good recall, or you're not a household name and you don't have a very creative execution and within that environment you get very low recall."

### No terminations

The interviews began with the questions on commercial recall, then moved on to a section of proprietary questions from subscribers. Next came questions from the agency, on such things as food and drink consumption during the game, and finished up with demographics. Widi says the interviewers had no terminations. "Once you start talking about the commercials, the respondents really get into it."

In general, results were similar along age and gender lines, although recall was higher with younger people, which is to be expected, as many of the ads were geared to a younger audience. "Some of the Pepsi ads, for example, a lot of the 45 and older viewers aren't used to that MTV style. But Pepsi is going after a younger age group, and they follow it all. They get the message," Widi says. □

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# marketing seminars



By Joseph Rydholm  
managing editor

## The ads were super if the game wasn't

A funny thing happened to me while watching the Super Bowl. Actually, it was more disturbing than funny. As the Buffalo Bills began self-destructing (a la our own Minnesota Vikings, four-time Super Bowl losers), I found myself more interested in the commercials than the game itself. Once, I even timed a trip to the bathroom so I wouldn't miss *the commercials*.

But who can blame me? Advertisers go all out to make the Super Bowl a memorable experience for viewers (sometimes I think they put more effort into it than the football players), unleashing a parade of high-buck ads with eye-popping special effects and star-studded casts. And while it all gets to be a bit overwhelming, at least it's not dull—which is often more than you can say for the actual game.

According to the annual SuperPoll, a post-game survey of 1000 Super Bowl fans conducted by Milwaukee-based Cramer-Krasselt advertising, the average total commercial recall figure for ad spots in this year's game was the highest it's ever been. So, like me, a lot of other people must have been impressed (in some way) by what they saw. The average recall was 66%, a big increase over 1992's 59% and the 57% average of previous years.

The agency began conducting the poll in 1989 to test audience recall of Super Bowl commercials. The interviews are conducted by telephone on the Monday following the game. The best-recalled spots this year were those by Anheuser-Busch, Goodyear, Lee Jeans, Master Lock, Pepsi-Cola, and Reebok.

"The commercials continue to be a more important part of the game, and we keep seeing the recall scores at those high levels and increasing year after year. It's part of the Super Bowl atmosphere and people get into it," says Larry Widi, marketing research director, Cramer-Krasselt.

### Kept watching

Although the game was one-sided, the survey found that viewers kept watching. "We still had some pretty darn good viewership in the fourth quarter, at least in terms of the people that we talked to. We didn't see a tremendous drop off in audience. And the people who watched in the fourth quarter seemed to be aware of the ads. Maybe they were getting a little bored with the game at that point and they paid more attention to the ads but our fourth quarter recall score was

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*Director of Market Research, Faultless Starch/Bon Ami*

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*Market Administrator, GTE Directories*

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*Project Coordinator, General Foods*

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*Product Researcher, Midmark Corporation*

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*Business Research Analyst, Dow Chemical*

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*Marketing Research Analyst, Consumer Power Company*

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