

Beating the ad testing systems • Understanding conjoint • Super Bowl ads

March 1996

Quirk's

# MARKETING RESEARCH

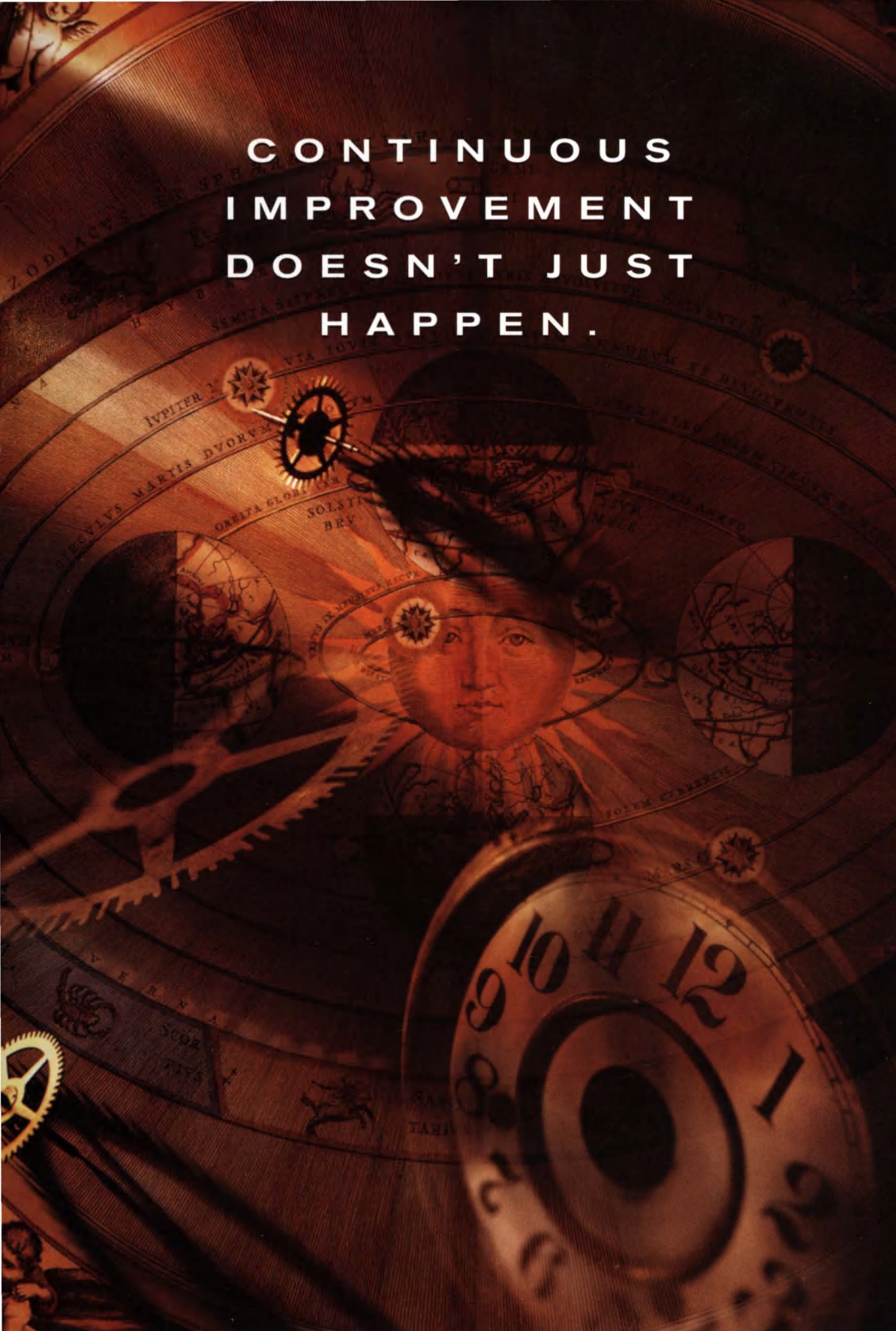
*Practical applications in marketing research*

*Review*

***Videoconferencing:  
One agency's not-  
so-secret weapon***



**Advertising Research Issue**



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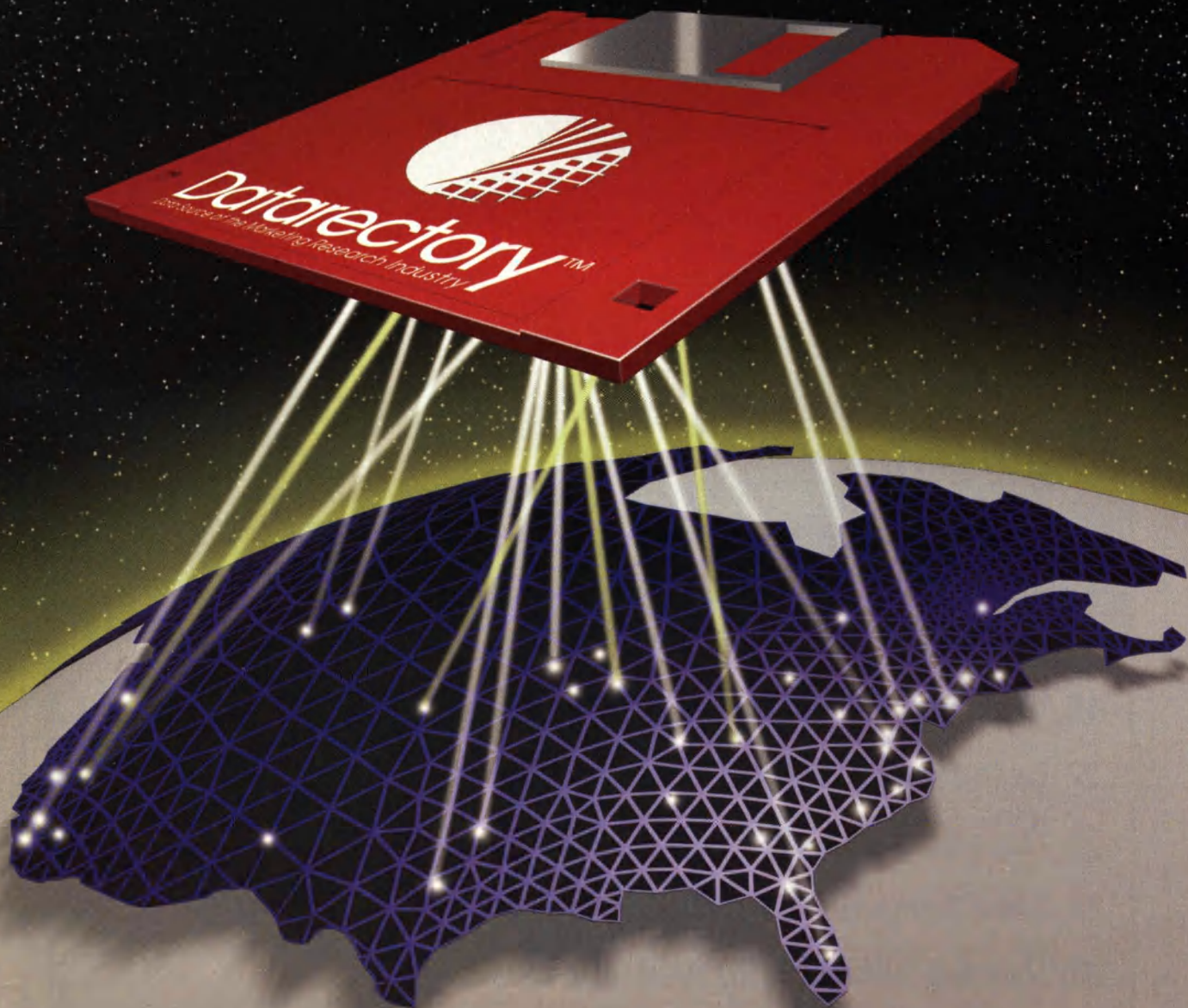
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# C O N T E N T S



Volume X, Number 3

March 1996

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Videoconferenced focus groups play an important role in earning new business for Ammirati Puris Lintas agency. Photo courtesy of FocusVision Network, Stamford, Conn.

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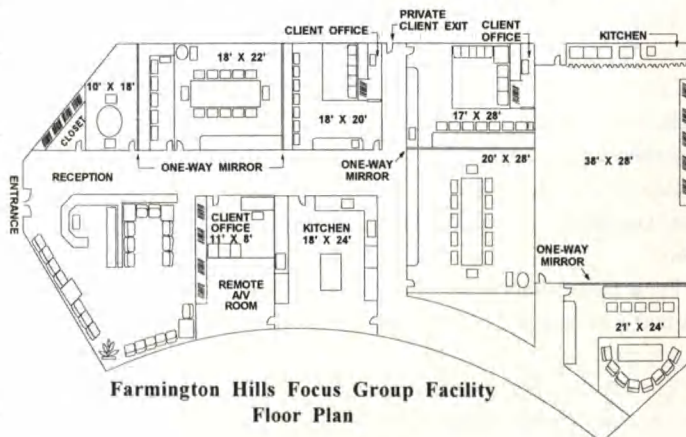
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## Seniors offer packaging suggestions

The Primalife Advisory Network (PLAN) is a not-for-profit group of more than 1,000 members nationwide, age 50 and older, who evaluate and provide their viewpoints on products and services geared toward or featuring mature Americans. Based on meetings and surveys conducted with PLAN members, seniors had the following tips for packaged goods makers on how to make their products more user-friendly for seniors:

- Increase print size (at least 12-point type is recommended, with good contrast).
- Make packaging square instead of round so things don't tend to roll and slip out one's hand.
- Include instructions on how to open packaging.
- Adjust package size to contents (things are too large for grocery bags and medicine cabinets).
- Use some method to differentiate pharmaceutical bottles; they all look the same.
- Products should include the price (it's hard to keep track of how much you're spending).
- Create a pull-tab for boxes such as Uncle Ben's Rice and pancake mix to make them easier to open.
- Always include an 800-number where consumers can call for information.
- Put important information in red type and large print so it can be found quickly and easily.
- Flip caps are preferred to twist tops to ensure the product and cap stay together.

For more information call 714-744-1291.

## Survey finds many parents of young children ready to buy car

Sweeping rebates and a blizzard of

promotions may not be the answer to an automaker's problems, but better marketing to families may be, finds a new survey from *Parenting* magazine and

continued on p. 36

## Credit card offers multiply on Internet

A growing number of credit card issuers are turning to the Internet to attract new customers, according to Behavioral Analysis Inc. (BAI), a Tarrytown, N.Y., marketing research and consulting firm. The last half of 1995 saw the number of credit card issuers with sites on the World Wide Web increase from 10 to almost 50, says Lisa Itzkowitz, marketing director at BAI. In addition, a number of card issuing institutions have sites under construction.

Visitors to at least 11 sites, including those of Advanta, American Express, Bank of America and Chemical Bank, are able to apply for credit cards online. A number of other banks have set up sites that allow customers to request applications or information on-line, the BAI study found. Among these card issuers are Bank of the Commonwealth, Barnett, First Hawaiian and Glendale Federal.

Other bank card issuers, including Citibank, First USA and Wells Fargo provide visitors to their Web site with application forms which can be downloaded, completed and faxed back to the card issuer. "As a cardholder acquisition channel, the Internet is clearly in the developmental stage," Itzkowitz says. "We don't expect large volumes of new card accounts to generated through the Internet, at this time. However, given the rapid pace of activity we have seen in the past few months, we will continue to monitor developments on the Internet very closely."

All the sites provide some information about their credit cards, and several provide an 800-number that can be used to apply for the card. BAI studies the credit card marketplace on an ongoing basis and issues Mail Monitor, a syndicated service that tracks credit card acquisition programs, on a quarterly basis. Mail Monitor, a joint venture of BAI and Market Facts, Inc., is available to all credit card issuers. For more information call 914-332-5300.



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# Product & Service Update

## Sawtooth product incorporates sound and video into questionnaire

Sensus Q&A, from Sawtooth Technologies, Evanston, Ill., is a Windows-based product that lets researchers create respondent-friendly computer interviews. Sensus Q&A's multimedia capabilities let users incorporate images, sound and video into their questionnaires. Because the software uses image and sound files, it eliminates the need to produce, copy and ship visual aids or product prototypes. Researchers can be sure their product shots and videos are shown exactly when they want them to be. For more information call 708-866-0870.

## CRS offers free sample size calculator

Creative Research Systems, Petaluma, Calif., is offering a free sample size and confidence level calculator on disk. Simply type in the size of the population being surveyed and the level of precision you need and the program instantly displays the sample size required. Users can also type in the details of an existing sample to find the confidence intervals and levels. The file, DEMO.ZIP, can be downloaded from the CRS

Bulletin Board at 707-765-6931 or requested by calling 707-765-1001 or e-mailing 72073.1207@compuserve.com.

## Equifax software aids CRA compliance

Sparta-CRA from Equifax National Decision Systems is Windows-based software designed to help bankers address new reporting regulations under the Community Reinvestment Act (CRA) of 1977. While the regulations are to be fully implemented in 1997, banks could choose to be evaluated under the new regulations as of January 1, 1996. Sparta-CRA enables banks to quickly analyze the geographic distribution of their loans and the financial needs of their community, then generate reports and maps to support their analysis. Sparta-CRA provides several geographic options in defining assessment areas. Formerly known as service territories or delineated communities, assessment areas show where the bank's branches are located and where the bank is originating its loans. Using median family income data, as suggested by the new regulation, Sparta-CRA then computes appropriate percentages and geographies for assessing low-to-

continued on p. 41



**MARCH MEETING ON MINN. MRA CHAPTER:** A meeting will be held from 4:30 p.m. to 7:30 p.m. on March 22 at the downtown Minneapolis Dayton's store, 12th floor Gallery, to discuss the formation of a Minnesota Chapter of the Marketing Research Association. The meeting will include guest speakers. A cash bar and hors d'oeuvres will be available. For reservations or information call Terri at 612-339-0085.

**TWO MRA CONFERENCES IN '96:** The Marketing Research Association will hold two national conferences in 1996. The 38th annual conference, titled

"Springboard to Success" will be held June 5-7 at Marriott's Orlando World Center in Orlando, Fla. The fall conference, titled "Crosstraining for the Future," will be held October 16-18 at the Westin Hotel in Denver. For more information call Debbie Midford at 860-257-4008.

**LATIN AMERICA SEMINAR:** Strategy Research Corp., Miami, will hold its second annual Latin American Market Planning Seminar on March 21 at the Miami Airport Hilton. The seminar will focus on the Latin American marketplace, the Latin American consumer market, strategic planning for Latin America, market research and marketing protocols and conventions. All attendees will receive a copy of SRC's 1996 Latin American Market Planning Report. To register or to obtain a copy of the report call 800-741-5441 or fax 305-649-6312.





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## Case history

# *More, better, faster*



The staff at Ammirati Puris Lintas views focus groups from its own Consumer View Center, similar to the one shown above.

## Advertising research

# When it's time to pitch new business, Ammirati Puris Lintas depends on videoconferenced focus groups

By Joseph Rydholm  
QMRR editor

In 1991, when Stamford, Conn.-based FocusVision Network, Inc. began promoting its videoconferencing system as a way for people in distant locations to observe qualitative research, the Ammirati Puris Lintas ad agency was one of the first organizations to sign up. Though the technology was rough around the edges, the agency knew it was a good idea, says Cheryl Bailey, executive vice president, managing director of planning and research, Ammirati Puris Lintas, New York.

Five years on, videoconferencing has become a key part of the agency's qualitative research efforts, particularly in its efforts to win new accounts. "When they presented the technology to us, we could see the tremendous potential it held. We felt it could be a huge advantage for us in terms of understanding the consumer and in terms of allowing more people at the agency to experience the consumer firsthand," Bailey says.

There are 37 FocusVision Network sites at research facilities across the U.S. in cities from New York to Los Angeles. Clients can also view the focus groups on FocusVision equipment in their offices, as Ammirati Puris Lintas does.

For the typical new business pitch, the agency does anywhere from six to 12 focus groups. Being able to watch the groups in its Consumer View Center means that the agency can do more research in a shorter period of time, Bailey says. "We're not spending our time traveling. The core members of the strategy development team are working up until the

moment the group starts."

When it comes to new business, time is the real enemy. "Potential clients used to give us three months to pitch their business — to develop a strategy and come up with creative executions. Now it's five weeks, sometimes less. FocusVision is the tool that allows us to do more, and do it better and faster."

### Valuable opportunity to learn

About a dozen people from the agency's core team view the groups, along with junior staff members, who get a valuable opportunity to watch and learn. "Particularly in a new business pitch environment, you're reluctant to let your entire creative team, your most senior account people, media people, package design people and research people out of the office for any great length of time to travel around the country to attend focus groups. FocusVision is the best of both worlds. It's a better way because all of these disciplines can experience the process firsthand and still be in the office at the same time," Bailey says.

"We use projective techniques extensively and it's great for our creative people to be able to observe projective techniques as opposed to having someone interpret them. We find that that is usually a very rich source of ideas."

Viewers also learn in real time. They don't have to wait a week to be briefed by those who watched the groups, Bailey says. "We used to send a team out on the road and they would phone in and brief everybody at the agency on what they learned. And when they came back someone from the creative staff would invariably say, did you ask them about this? Or say, gee, I wish I had known that because maybe we should tweak the strategy this way."

FocusVision Network, like other videoconferencing systems, allows distant observers to communicate with the moderator and those in the backroom. "So as things are happening during the groups we are able to seize on something immediately and talk about it, and figure out if we want the moderator to switch gears and follow up on a point,"



Videoconferencing was a huge help in the agency's efforts to win new business from MasterCard and Burger King.

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# *How researchers can be effective partners in the*



# *advertising development process*

By Thomas D. Dupont

*Editor's note: Thomas D. Dupont is president of D<sup>2</sup> Research, Mountain Lakes, N.J. He is a past chairman of the board of the Council of American Survey Research Organizations.*

**D**oes the following scenario sound familiar? Whiskaway is an automatic swimming pool cleaner tablet which, when dropped into the pool, kills bacteria and algae. The brand was introduced using TV advertising with a "convenience" strategy. Sales growth has been substantial, though lately it has started to slow down. The V.P.-

marketing has decided that a new strategy is needed, and favors focusing on the core benefit of cleaning. In response, the agency has just finished a creative exploratory and has presented three storyboards, each with a different copy promise. Among them are:

"Kills 99 percent of the bacteria in the pool."

"The #1 choice of professional pool technicians."

At the end of the meeting, after everyone has expressed their opinions, heads turn to the research department representative, who is asked, "So, when can we schedule tests of these commercials?"

Based on 25 years of participation in such meetings, let me suggest some ways the proactive researcher can intervene and make a valuable contribution to the team effort.

**1. Systematically question the assumptions underlying the ad.** Every ad rests on a set of assumptions about the target market — who they are, what they know or believe, what is important to them and what they are able to understand. In many cases there may be a strategy statement that specifies who the target is and what's important to them (i.e., what benefits should be stressed). Sometimes this is based on research, sometimes not. Rarely (even among the most sophisticated advertisers) is there an explicit statement of what the target knows or can understand. Consequently, the researcher needs to determine what, if any, assumptions the ad makes about the target market.

Will consumers understand the claims being made? Consumers do not hang on every word in a commercial, nor do they always watch carefully what is going on. Advertisers are frequently surprised at the degree to which simple (to them) commercials are misunderstood by consumers. The following questions will help you assess the commercial's potential for confusion.

- Do the pictures tell one story and the words another? A recent Alamo rental car commercial set very clearly in the future (with flying cars and people in futuristic garb) also included the statement "Alamo is now worldwide." Despite the obvious future setting, some consumers nevertheless interpreted the claim to mean that Alamo cars are now widely available overseas.

- Does the commercial make a claim that is later qualified, either by voice or in print? Since we know consumers don't necessarily listen to or watch the entire commercial, the qualification may be lost and an incorrect message thereby communicated.

- When parody is being used, will the audience get it? Several years ago Isuzu ran commercials featuring schlocky car salesman Joe Isuzu making outlandish claims about the automobile — so outlandish no one would believe them. But, did everyone know Joe was intended as parody, or did many take him semi-seriously and translate his sleaziness to a negative image of the car?

- Does the audience share the experiences that are necessary to make the ad work? Have consumers actually experienced situations like those depicted in the adver-

tisement, and do references to "common cultural experiences" have meaning? Several recent commercials require, as a basis for understanding, that the viewer know who Michael Jordan is and that he recently "un-retired." Doubtless, those ignorant of "Mike" are rare; it is equally true, though, that for this subset of the universe the commercials are meaningless.

- If celebrities are used, will the audience know who they are? If there is supposed to be a relationship between the celebrity and the brand, will the audience know it? Does the celebrity

fit the brand, thus providing synergy, or is the celebrity an add-on?

One of the most successful examples of celebrity synergy is Polident denture cleanser's use of Martha Raye as spokesperson during the 1980s.

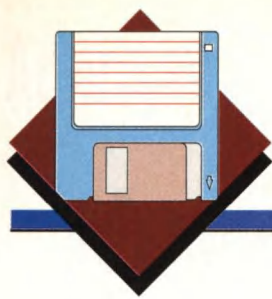
Not only did she show that energetic, glamorous people use denture cleansers, but she had a special synergy with the brand, due to warm feelings about her among the target audience and her nickname "Big Mouth."

Asking these questions and challenging these assumptions can be the researcher's most valuable contribution. It won't win popularity contests, but it will — when the process produces better advertising — earn respect.

**2. Question whether a new strategy is really required.**

***When parody is being used, will the audience get it? Several years ago Isuzu ran commercials featuring schlocky car salesman Joe Isuzu making outlandish claims about the automobile — so outlandish no one would believe them. But, did everyone know Joe was intended as parody, or did many take him semi-seriously and translate his sleaziness to a negative image of the car?***

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## Helping managers understand the value of conjoint

By Bryan Orme

*Editor's note: Bryan Orme is a customer support consultant with Sawtooth Software, a Sequim, Wash., maker of marketing research software.*

Market researchers face two challenges as they provide market intelligence for managers. First, they must meet managers' objectives with useful, valid results. Second they have to communicate those results effectively. Failure on either of these points is fatal.

Conjoint analysis provides useful results which are easy for managers to embrace and understand. It is no wonder that conjoint analysis is the most rapidly growing and one of the most widely used market research techniques today.

This article discusses the benefits of conjoint that managers are most likely to embrace and highlights a dangerous pitfall to avoid when presenting market simulators.

### Realism begets better data

Many managers have limited experience with statistics and can be skeptical of or intimidated by advanced methods like conjoint. Unfortunately, simpler approaches can be unrealistic or even useless. Suppose we are conducting a study about laptop computers. Consider the following question:

**Q10. When purchasing a laptop computer, how important is . . .**

	(Circle One Per Item)								
	Not Important				Very Important				
	1	2	3	4	5	6	7	8	9
Brand	1	2	3	4	5	6	7	8	9
Battery life	1	2	3	4	5	6	7	8	9
Processor speed	1	2	3	4	5	6	7	8	9
Weight	1	2	3	4	5	6	7	8	9
Price	1	2	3	4	5	6	7	8	9

Respondents can answer this type of question rather quickly. The average respondent answers with high ratings, while the bottom half of the scale is largely ignored. This results in sub-

par data for statistical analysis: skewed distributions, with typically little differentiation between attributes. Such "self-explicated" importances reveal little about how to build a better laptop. How much battery life will buyers trade off for a given increase in processor speed? Further, stated importances often don't reflect true values. It may be socially desirable to say price is unimportant — after all, respondents don't want to appear cheap. Yet, in real-world laptop purchases, price may become a critical factor.

Even though many managers won't understand (or care to) the statistical shortcomings of self-explicated data, they should agree that this exercise can't be very realistic. They'll concur that buyers can't always get the best of everything in the real world; buyers must make difficult trade-offs and concessions. When people are forced to make difficult tradeoffs, we learn their true values. Convince managers of this, and you are well on your way to helping them understand the value of conjoint.

Conjoint aims for greater realism, grounds attributes in concrete descriptions, and results in greater discrimination between attribute importances. Conjoint creates a more realistic context. The example below from Sawtooth Software's Adaptive Conjoint Analysis (ACA) illustrates this:

**Which of the following laptop computers would you rather purchase?**

486 DX/2 7-hour battery life \$2,250
--

OR

Pentium 75 5-hour battery life \$2,750
--

Strongly Prefer Left 1 2 3 4 5 6 7 8 9 Strongly Prefer Right

Of course, conjoint questions can also be asked one product profile at a time, as in traditional card sort. The rationale behind pairwise comparisons is this: people can make finer distinctions when they directly compare objects. For ex-

ample, if I hand you a 4-pound rock, take it away, and then hand you a 5-pound rock, chances are you won't be able to tell me which is heavier. However, if you hold one in each hand, you'll have a much better chance of guessing which weighs more.

Another flavor of conjoint, choice-based conjoint, offers even greater realism. The example below shows how Sawtooth Software's Choice-based Conjoint (CBC) approaches the same subject:

Managers don't need to know about orthogonal designs, main-effects assumptions or how utilities are derived. You will probably bore (or even annoy) them if you tell them. Instead, managers need to grasp that realistic models result from realistic questioning methods and be comforted that conjoint is a reliable, time-proven method.

#### Brand equity

Conjoint provides useful results for product development,

Which of the following laptop computers would you purchase?

(1) IBM 486 DX/2 4 lbs. 12-hour battery life \$3,000	(2) Compaq Pentium 90 6 lbs. 7-hour battery life \$2,750	(3) Toshiba Pentium 75 5 lbs. 5-hour battery life \$2,250	(4) None: If these were my only choices, I would defer my purchase.
---	---	--	--

Type the Number Representing Your Choice

Choice-based conjoint questions closely mimic what buyers do in the real world. Including "none" as an option enhances the realism and allows those respondents who are not likely to purchase to express their disinterest. Choice-based data reflect choices, not just preferences. If we agree that the ultimate goal of market simulators is to predict choice, then it's only natural that we would value choice-based data.

pricing research, competitive positioning and market segmentation. Conjoint can also measure brand equity, which is an especially critical issue for many managers.

Brand equity encompasses the intangible forces in the market which allow a product with a brand name to be worth more to buyers than one without. High equity brands command higher prices and are less price sensitive. Since brand equity goes directly to the bottom line, it's no surprise that

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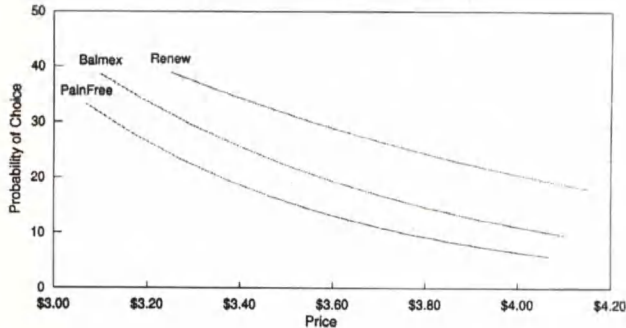
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managers are focused on brand equity.

Choice-based conjoint offers a reliable way to measure brand equity. It presents respondents with varying product configurations and asks which they would purchase or choose. Each brand is presented at different prices throughout the interview. The percent of times respondents choose each brand at different prices reveals preference and price sensitivity for brands. Compelling demand curves result when we plot these "wins" by price point and connect them with smooth lines, as shown below for three hypothetical brands of pain relievers: Renew, Balmex and PainFree.

If the brand manager for Renew wants to quantify the price

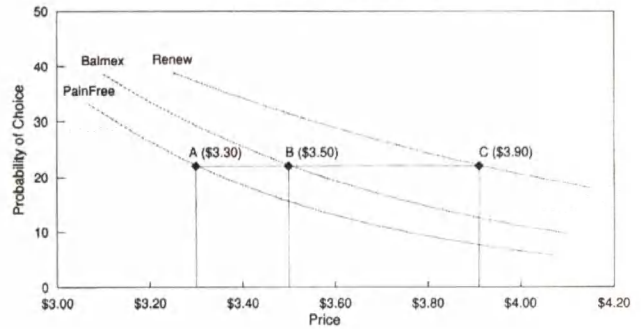
**Choice-based Conjoint**  
Demand Curves



premium it commands over the other brands, choice-based conjoint reveals the answer. We use the same demand curves as above as a starting point.

This time, we've drawn a horizontal line through points A,

**Choice-based Conjoint**  
Brand Equity Measurement



B and C to represent a level of equal relative demand or preference. If Renew is priced at \$3.90 and Balmex at \$3.50, respondents on average will be indifferent (have the same preference) between the two. This 40-cent difference (Point C minus Point B, or  $\$3.90 - \$3.50$ ) represents the premium, or brand equity that Renew commands over Balmex. Similarly, Renew commands a 60-cent premium over PainFree (Point C minus Point A).

Another approach to assessing brand equity results from comparing preference if all brands were offered at the same price. Imagine that we continue drawing the vertical line from \$3.50 through point B until it intersects Renew's demand curve. That point is a relative preference of 32. At \$3.50, Balmex and PainFree capture preference of 22 and 16,

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respectively. At this price, Renew is preferred by a ratio of 32/22, or it captures 45 percent higher preference than Balmex. Similarly, Renew is preferred by a ratio of 32/16, or 100 percent over PainFree.

### Strategic pricing research

In an ideal world, researchers could accurately measure price sensitivity by manipulating prices in test markets and measuring changes in demand. While scanner technology has made this sort of analysis more feasible than ever before for many categories of consumer goods, these real world experiments face crippling hurdles. Market forces don't remain constant for the duration of the experiment: macro economic forces can alter demand; competitors change their prices and/or promotions; buyers stock up to take advantage of lower prices; new products are introduced. While conjoint pricing experiments are not as realistic as the real world event, conjoint experiments hold market forces constant. The relative preferences and sensitivities we observe in the controlled experiment should be borne out in the real world.

In the previous demand curve example, Renew holds the enviable position of being preferred to Balmex and PainFree at all price levels. Notice also that the demand curves are not parallel: Renew's preference declines at a slower rate than the other brands as price increases. Respondents are less price sensitive toward Renew than the other brands. The ability to measure unique price sensitivities by brand is an advantage choice-based conjoint enjoys over traditional main-effects-only conjoint.

Demand curves provide strategic information for pricing decisions. Suppose Renew's manager is considering initiating a price cut. Renew is the market leader, and her past experience suggests that the discount brands will react with similar price cuts. She could learn a great deal using conjoint data — enough to avoid a mistake. The slopes of the demand curves show that as prices are lowered, Renew will gain share at a slower rate than Balmex or PainFree. If she lowers price and the other brands follow, Renew's market share and profits should decrease.

Price sensitivity can be quantified for each brand by examining the ratio of preference at the highest price versus preference at the lowest price. Alternatively, the price elasticity of demand (defined as percentage change in demand divided by percentage change in price) can be easily calculated for each brand in a CBC study.

Some managers have been so pleased with this approach that they have funded wave after wave of conjoint tracking studies. They compare demand curves from each time period to quantify changes in brand equity, to gauge the results of previous pricing or other marketing mix changes, and to formulate future strategy.

### Conjoint predicts preference, not market share

I was recently involved in a choice-based conjoint study for a manufacturer of personal computers. Our main contact was the pricing manager whose objectives were to measure

continued on p. 44

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# War stories:

## True life tales in marketing research

By Art Shulman

*Editor's note: "War stories" is a regular feature in which Art Shulman, president of Shulman Research, Van Nuys, Calif., presents humorous stories of life in the research trenches. Readers are invited to call (818-782-4252) or fax (818-782-3014) Shulman with stories of their own.*

In addition to preparing this column and operating my market research business, I write plays. Over the past few months I've had several of them performed at the theater group I belong to. As a result, I attend frequent rehearsals. This has all been a little confusing to my six-year-old stepson John, who told his mother, "When I grow up I want to be a research guy like Art and go to the theater."

This is the same John who asked me, as I was working at my desk, if he could eat something in the "vegetable group" for lunch. I mentally commended him for putting to work his first-grade lesson on nutrition and told him yes. Later, when I asked what he'd eaten, he told me, "Potato chips."

The kid obviously has some talent for market research — at least in putting together a proposal that will sell!

Sometimes respondents have their own agendas. Freelance moderator Paul Schneller reports conducting a one-on-one interview with a woman on ads about nutrition. When he asked, "What did you think of the ad with the chil-

den?" his chatty live-wire replied without a beat, "It reminds me of my genetically engineered cat." Of course, the ad, consisting solely of close-ups of children's smiling faces, had nothing in it looking like a cat or any other animal. Throughout the interview, regardless of what Schneller asked, the woman kept referring to the cat, at one point volunteering, "It's part cat and part skunk." Finally, like a proud parent, the woman pulled out a full series of snapshots from her purse, and sure enough, the cat had a bushy black tail that stood straight up. Terrific, Schneller thought, hearing his clients rolling with laughter in back of the mirror.

Jennifer Franz of J.D. Franz Research reports conducting a focus group on customer service that had a "crazy" in it. The man, a militia member, kept making strident speeches during the session, insisting to Franz and the rest of the group that large corporations now control American society. The problem for Franz was that the guy was a pretty effective speaker. When Franz finally told him, "You are making a speech and we can't have speeches in this group," another participant, a typical middle-of-the-road citizen, piped in. "You certainly should let him make a speech if you want the truth! All you want is sound bites!"

Was this the market research revolution that Franz had heard was coming?

Donna Tinari-Siegfried of Funda-

mental Research reports doing a series of focus groups with children on lighted pegboard toys. The sessions were audio and videotaped, and after the first evening's session her clients left for dinner, Siegfried planning to join them after cleaning up a few things. She went into the focus room, and to her horror, tripped over an electric cord. All of the games tumbled to the floor, with hundreds of colored pieces, arranged into intricate designs, flying from the pegboards. After saying to herself, "Holy smokes!" (okay, that's not exactly what she said), she called the restaurant and told her client she was a bit more fatigued than she thought and would see them the next day. Siegfried spent the better part of the night putting all the colored pieces back in their spaces.

The next day's sessions went beautifully. A day later, Siegfried received a call from her client, who'd had an opportunity to view the tapes, which unbeknownst to Siegfried, were still running when she tripped and had captured her in full clumsiness. The client was nice enough to express appreciation for all the time Siegfried had put into redoing the designs.

From then on, Siegfried made sure her video and audio tapes were shut off immediately following each session.

If any of you have stories about tapes not being shut off, send them to me! □

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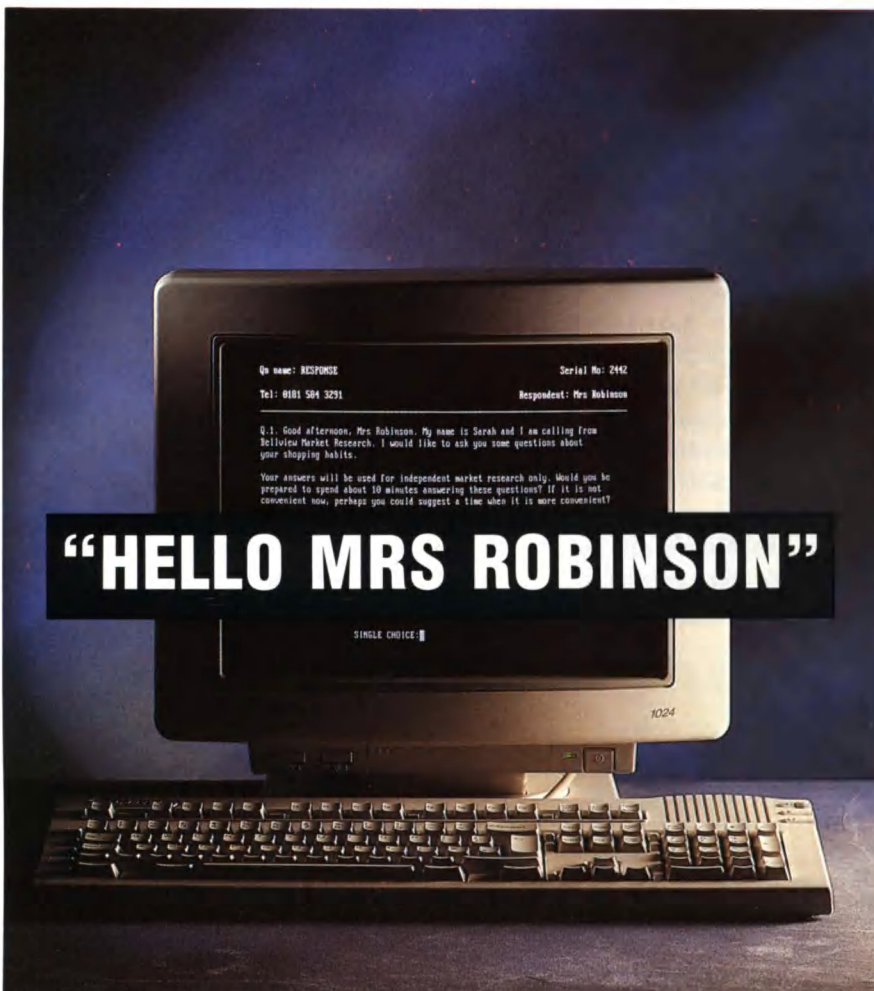
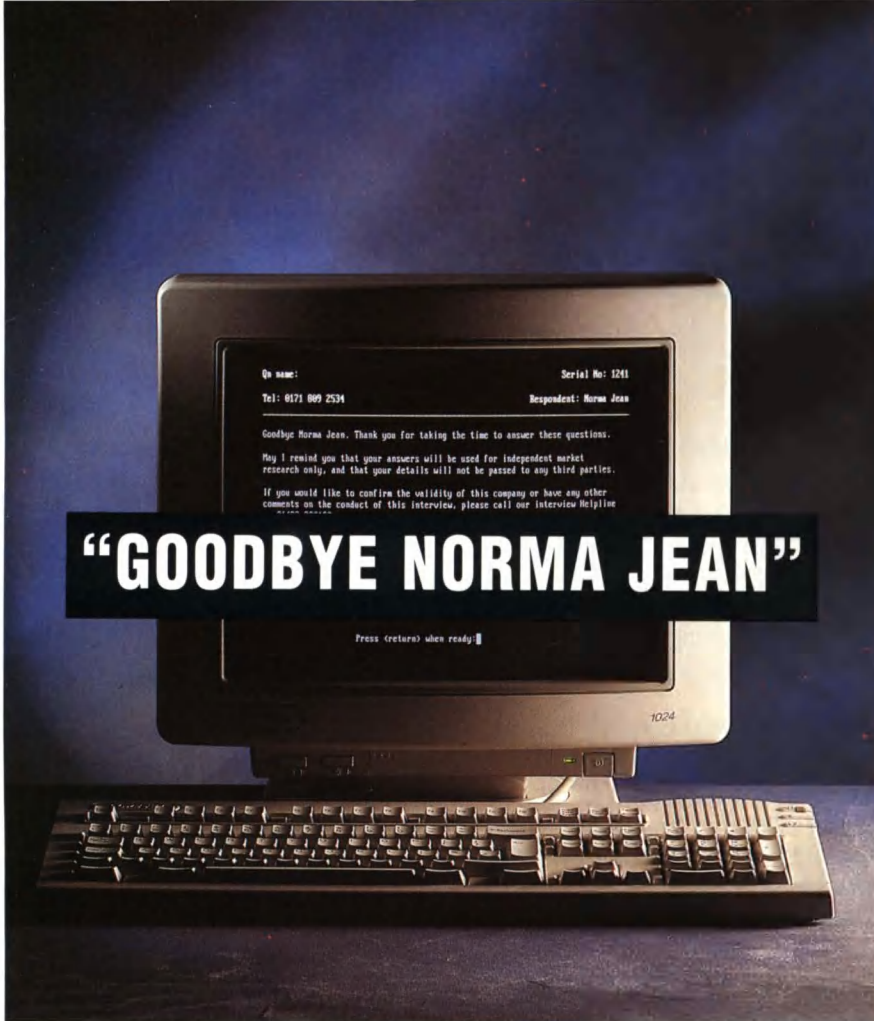
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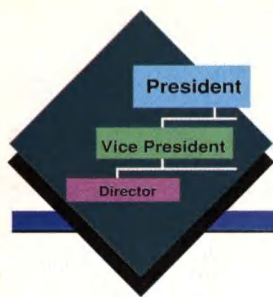
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# Names of Note

**Monet Wong and Brian O'Connor**



Wong

O'Connor

have joined *Rockwood Research*, St. Paul, as project directors.

**Lance Imburgia** has been named executive vice president of *Jaffe &*

*Soeder*, a Glendale, Calif., marketing firm.

*Chilton Research Services*, Radnor, Pa., has named **Bruce Simmon** as consultant to head the Communications Division of the company's Information/Communications/Entertainment Group.

*Maritz Marketing Research*, St. Louis, Mo., has announced a number of promotions: **James Johnson** to director, syndicated studies for the firm's Agricultural Division; **Terrence Kaufman** to vice president and Western Division manager, and **Kathy Keim** to director, research operations, at the company's Automotive Research Group in Toledo,

Ohio; **David Harwood** to vice president, division manager, survey center support; **Debra Durst** to program manager for the firm's Performance Measurement Group in St. Louis; **Marsha Young** to vice president, customer value assessment; **Mary Rubin** to director, research and business integration; and **Cathy Acreman** to senior research manager at the company's Performance Measurement Group in Los Angeles.

**Bruce Crandall** has joined *Decision Analyst, Inc.*, Arlington, Texas, as an account executive in client service.

*Action Marketing Research*, Minne-



Crandall

Kihm

apolis, has added **Jan Kihm** to its staff as an account executive.

**Carla Collis** has been promoted to vice president at *Elrick and Lavidge*, Tucker, Ga. **Wendi Williamson** has been promoted to vice president. **Den-nis Storen** has joined the firm as account director and **Steve Wierdak** has joined the firm's Chicago office as account director.

*ICT Group, Inc.*, a Langhorne, Pa., marketing, management and information research firm, has promoted **Annette M. Irwin** to senior vice president of sales for its ICT Direct division. **Michael Hallowell** has been named

continued from p. 55

SSI-MEDIA

## OBJECTIVE:

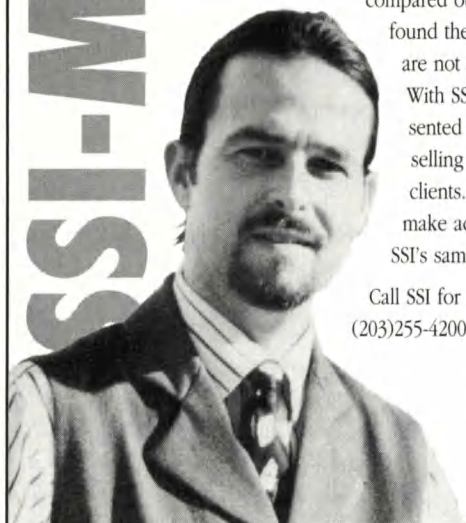
Define random digit samples for newspapers that circulate by zones, which are defined by ZIP Codes.

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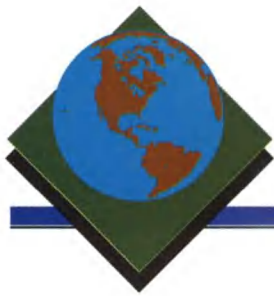
**Bill Truett** (project director at **KPC Research**, a subsidiary of Knight Publishing Company in Charlotte, NC) — "We use SSI's ZIP/Exchange Analysis to define random digit samples for targeted study areas. The ZIP report tells us what we can expect for coverage and hit rate, and that's typically what we do find. I have

compared other companies to SSI and found the other companies' samples are not as proportional or efficient. With SSI samples, areas are represented very well — one of the selling points that we use with our clients. And I believe our clients can make accurate decisions based on SSI's samples."

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# Research Company News

**The Vanderveer Group, Inc.**, Fort Washington, Pa., has changed its name to TVG, Inc. The health care marketing services firm has also opened a new focus group facility in Fort Washington, a suburb of Philadelphia. The new facility features a state-of-the-art conference room, two-tier viewing room, video-equipped client lounge, videoconferencing studio and audio and video taping capabilities. Call Leanne Batzel at 215-283-5384 for more information.

**Spatial Insights**, a Vienna, Va., geographic information services firm, recently completed a pro-bono evaluation of the geographic and demographic characteristics of donors to the Nation's Capital Affiliate of the American Heart Association. The Nation's Capital Affiliate serves the Washington, D.C., area by funding cardiovascular research and providing educational programs. The evaluation performed by Spatial Insights helped delineate demographic profiles and identify opportunities for additional solicitations and specific fundraising events.

Kaiser Permanente of Colorado will use The Point-of-View Survey System, a small, electronic data-gathering device made by **Point-of-View Survey Systems, Inc.**, Denver, to survey its 311,000 members in the Denver, Boulder and Longmont, Colo., areas.

**FocusVision**, a Stamford, Conn., provider of videoconferencing for

market research, has conducted its first international transmission of live focus groups. Field Facts International, London, is the first facility with FocusVision for global service. Sites in Paris, Frankfurt, Milan and other locations are planned soon. In addition, six more facilities have signed on in the U.S., bringing to 37 the number of domestic FocusVision sites.

**Market Facts**, Arlington Heights, Ill., declared a quarterly dividend of 10 cents per share.

**SPSS Inc.**, Chicago, has reached

an agreement in principle to acquire **BMDP Statistical Software, Inc.**, a Los Angeles maker of statistical software. SPSS expects to pay approximately \$600,000 in cash and 13,000 shares of common stock to acquire the assets of privately-held BMDP. SPSS also expects to assume certain liabilities. The company said it expects the transaction to add about \$1 million in revenue and approximately 2 cents to earnings per share in 1996.

**MEMRB International**, a re-

continued on p. 51

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## ***Creative testing: "Beat the systems" with four simple rules***

By Tim Huberty

*Editor's note: Tim Huberty vice president, account planner, at Campbell-Mithun Esty, Minneapolis. He is also an adjunct professor at the Graduate School of Business, University of St. Thomas, St. Paul, Minn.*

**I**nevitably, after the advertising agency loses its battle to test its own commercials, the worrying really starts. Now, the agency will no longer have any control over the process. The fruit of their labors will be taken from them and put in the hands of — gasp! — an outside testing service. Now all the agency can do is wait, worry and even pray.

The purpose of this article is not to present the pros and cons of outside testing services. Those services have been around for several years now, so, obviously, they're doing something right. They take an advertising agency's creative product — be it in a preliminary or a finalized version — and collect consumer reaction to it. Agencies argue that these "independents" rarely have the full insight to the strategy which went into the campaign (but then, neither do consumers). Clients point out that before paying millions of dollars in media fees, they want some gauge on how the advertising will play with con-

sumers. And to allow the agencies to test their own work would be a blatant conflict of interest. So they turn to independent research suppliers who only have their credibility, reputation and good name riding on the process.

At that point, most agency people, grumble, gripe and throw up their hands: "It's going to be tested. And I can't do anything about it." However, it is also true that most agencies know that their work is going to be tested even before the creatives are given the assignment. And they can do something about it. The purpose of this article is look at those testing services, figure out what makes an ad test "good" and work that learning into the development of future creative.

So this article will remove that victim mentality from the agency and make them active craftsmen once again. I will set forth four simple rules which should help agencies design advertising that "beats the systems." Herein are four simple hints which should help any commercials test better in any system. In fact, it could be said that following these rules from the outset might even make any testing unnecessary!

### **The testing services**

In preparing for this article, several

testing services were examined. Several methodologies were scanned. These include:

- **Over-the-Air Testing Services** (such as ASI) — Here one or more rough or finished commercials are shown over several geographically-dispersed cable television systems, "hidden" within the context of new TV programming respondents are recruited to watch. Within 24 hours after the program has aired, respondents are called and quizzed about one or more ads.

- **Forced Exposure Systems** (such as Millward-Brown or Diagnostic Research) — Here respondents are shown rough or finished commercial at a shopping mall research location. Respondents are shown one commercial and then asked several questions about it.

- **Audience Sessions** (such as McCollum Spielman or ars) — Once again, respondents are recruited to watch "new television programming." This time, however, they will meet at a central location (an auditorium) and review the advertising with hundreds of others.

- **Print Testing Services** (such as Mapes and Ross) — The client's ad is "dubbed" into a magazine, like countless

continued on p. 46

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<b>Cincinnati</b> <i>The Answer Group</i>	<b>Pittsburgh</b> <i>Campos Market Research</i>
<b>Columbus OH</b> <i>Quality Controlled Services</i>	<b>Raleigh</b> <i>L&amp;E Research</i>
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<b>Denver</b> <i>Information Research, Inc. Colorado Market Research</i>	<b>San Francisco</b> <i>Ecker &amp; Associates Fleischman Field Research</i>
<b>Detroit</b> <i>Quality Controlled Services</i>	<b>Seattle</b> <i>Gilmore Research Group</i>
<b>Houston</b> <i>C.G.S. Center for Qualitative Studies</i>	<b>St. Louis</b> <i>Quality Controlled Services</i>
<b>Kansas City</b> <i>Quality Controlled Services</i>	<b>Tampa</b> <i>Suburban Associates Superior Research</i>
<b>Los Angeles</b> <i>Adler-Weiner Research, Inc. Quick Test Opinion Center Trotta Associates</i>	<b>Washington, D.C.</b> <i>House Market Research, Inc.</i>
<b>Los Angeles Orange Cty.</b> <i>Trotta Associates Irvine, CA</i>	<b>Westchester, NY</b> <i>Fieldwork, Inc.</i>
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## The new communications criteria in advertising research

By Christiaan de Brauw

*Editor's note: Christiaan de Brauw is executive vice president of Creative & Response Research Services, Inc., Chicago.*

In the past 20 years, we have seen some fairly dramatic changes in the practice of advertising. Not only do ads look and sound completely different, they come through more media channels and in ever greater numbers.

Although our clients still hope that their advertising will increase sales, their specific expectations of what an ad can accomplish have become far more realistic. At the same time, consumers have become infinitely more sophisticated at processing advertising messages, due to the sheer volume of ads that are aimed at them every day.

All of this has forced communications researchers to rethink what makes advertising effective and how to measure that effectiveness. This article describes communications performance criteria that appear applicable today and then shows some examples of how to address them in research.

### Traditional communications criteria

In the '70s and '80s, the industry relied on a set of well-defined criteria

Communications Performance Criteria	Typical Definitions
• Breakthrough	The ability of the ad to stand out, be noticed, or recalled from exposure in the context of other media fare.
• Message communication	Verbal playback of the perceived message: What was the main idea the advertiser was trying to get across to you? What else?
• Importance and believability of the perceived message	How important is that idea to you? How believable?
• Attitude change, or "persuasion"	Changes in perceived quality, effectiveness, value, attractiveness, uniqueness, etc., of a product or brand. Changes in ranked choice. Changes in intent to buy, likelihood of considering to buy.

for measuring the effectiveness of an ad, as shown in the chart above.

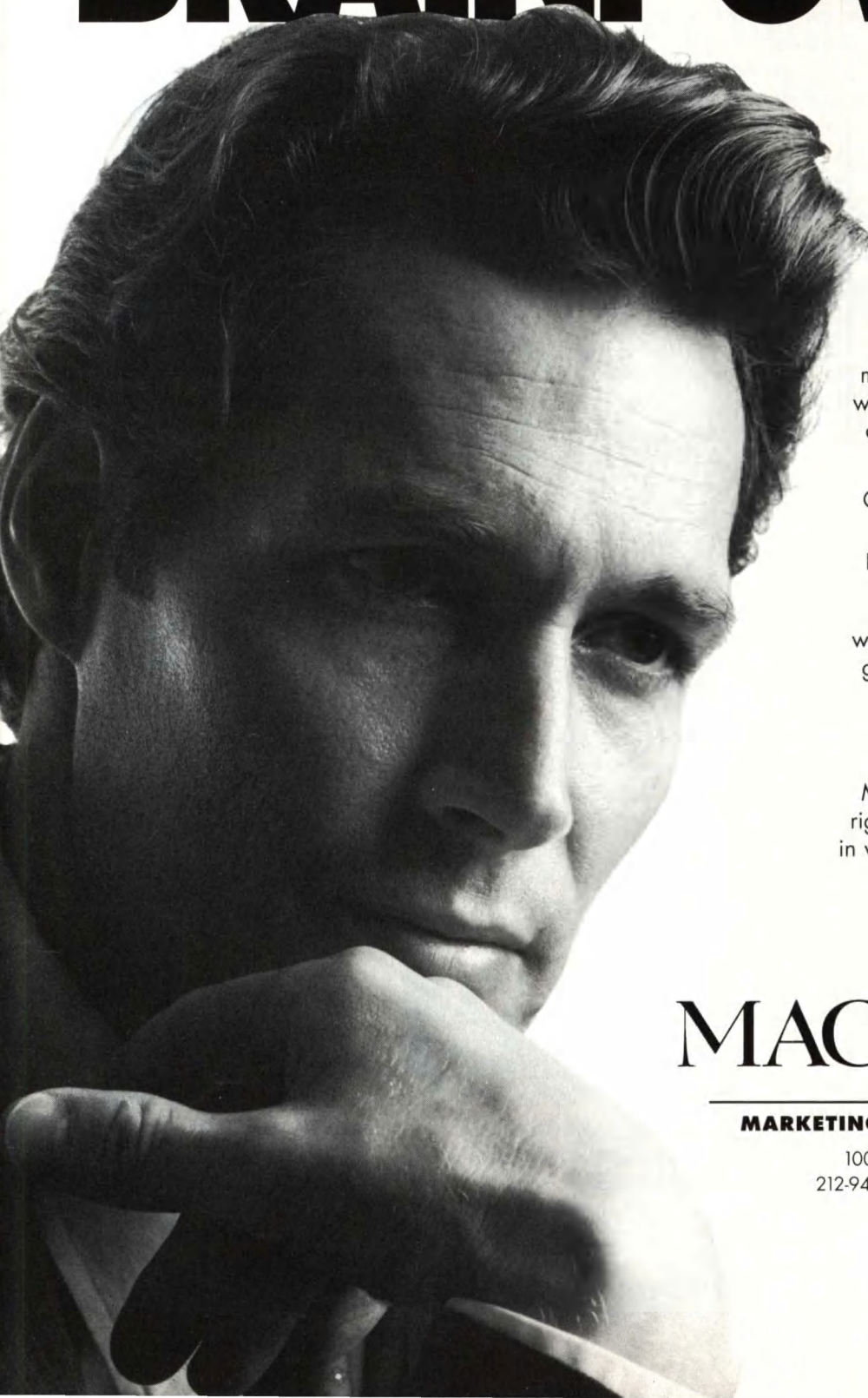
Much time and energy was spent on a debate over which of these criteria was most important, especially in circles where clients insisted on a single "score." There was the Burke or Gallup & Robinson camp favoring breakthrough measures, and there were the ARS/ASI/Buy Test proponents insisting that persuasion was the only valid single indicator. And there were the behavioral

measures, measuring involuntary behavioral responses like skin conductivity, eye movement and voice pitch to ads.

Thoughtful researchers would insist that ad effectiveness couldn't be represented by a single score, and would argue for a combination of measures, which complicated the "go-no go" decisions but which benefited the client's intent to learn how to improve future ad executions.



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Although no one ever claimed that ad research was very "real world," it was functional, because people in the industry generally agreed that advertisements that tested well in terms of one or more of the accepted criteria were more effective than advertisements that tested poorly.

#### Advertising today

When we look at advertising today, the '70s testing criteria no longer fit. For example, what would be the point of asking, "What was the main idea the advertiser tried to get across?" when the TV commercial shows a savvy flock of ants carrying off a bottle of Budweiser?

Targeting has become much more sophisticated, and, compared to years ago, clients seem less concerned about their messages being ignored or rejected by whoever isn't their key customer. It used to be that major advertisers would worry about being insulting to anyone. Nowadays, if you connect with your customer or prospect, that's all that matters.

Advertisers do spend a lot of effort in developing their message or campaign concepts. They want guidance for the total marketing effort for the brand or the product. The interest is in getting the idea right.

Clients have become more sophisticated about how to use different media together. For example, television ads are used to open the door for a direct mail effort, telemarketing or a free-standing newspaper insert. As a result, there appears to be less interest in learning how an individual ad performs by itself, but more how it contributes to the total marketing effort.

This shift in the roles advertising is expected to perform has led us to define the new criteria of advertising performance. So far, these criteria have been based on qualitative research. This is not just because we haven't found satisfactory tools for quantification. Rather, the types of questions being asked of advertising researchers (getting the right idea and relating it to total marketing) are becoming more exploratory and intuitive, less standardized and statistical.

Even so, it is possible to define criteria that contribute to the effectiveness of getting the right idea across to consumers. At the same time, it is becom-

ing clear that, in order to be effective, advertising has to reach higher than ever before.

#### The new communication performance criteria

From studying consumers' impressions and perceptions of advertising in the marketplace, we have distilled a number of contemporary communication performance criteria:

a) Receptivity. Where "breakthrough" used to be sufficient as an indicator of how attention-attracting an ad is, this no longer is enough. Today, every message vies for attention. The problem is how to sustain attention.

The successful ad rewards the consumer for paying attention. In other words, the consumer wants to feel that once one pays attention, it remains worthwhile to give attention. Without this incentive, people ignore the message, use their remote control, or toss the junk mail.

The burden on the advertiser is huge; there's a need to be noteworthy right away and a need to be entertaining, relevant or involving in some way.

b) Total communication. Total communication involves both direct (intended) communication and indirect communication conveyed by the context of the message.

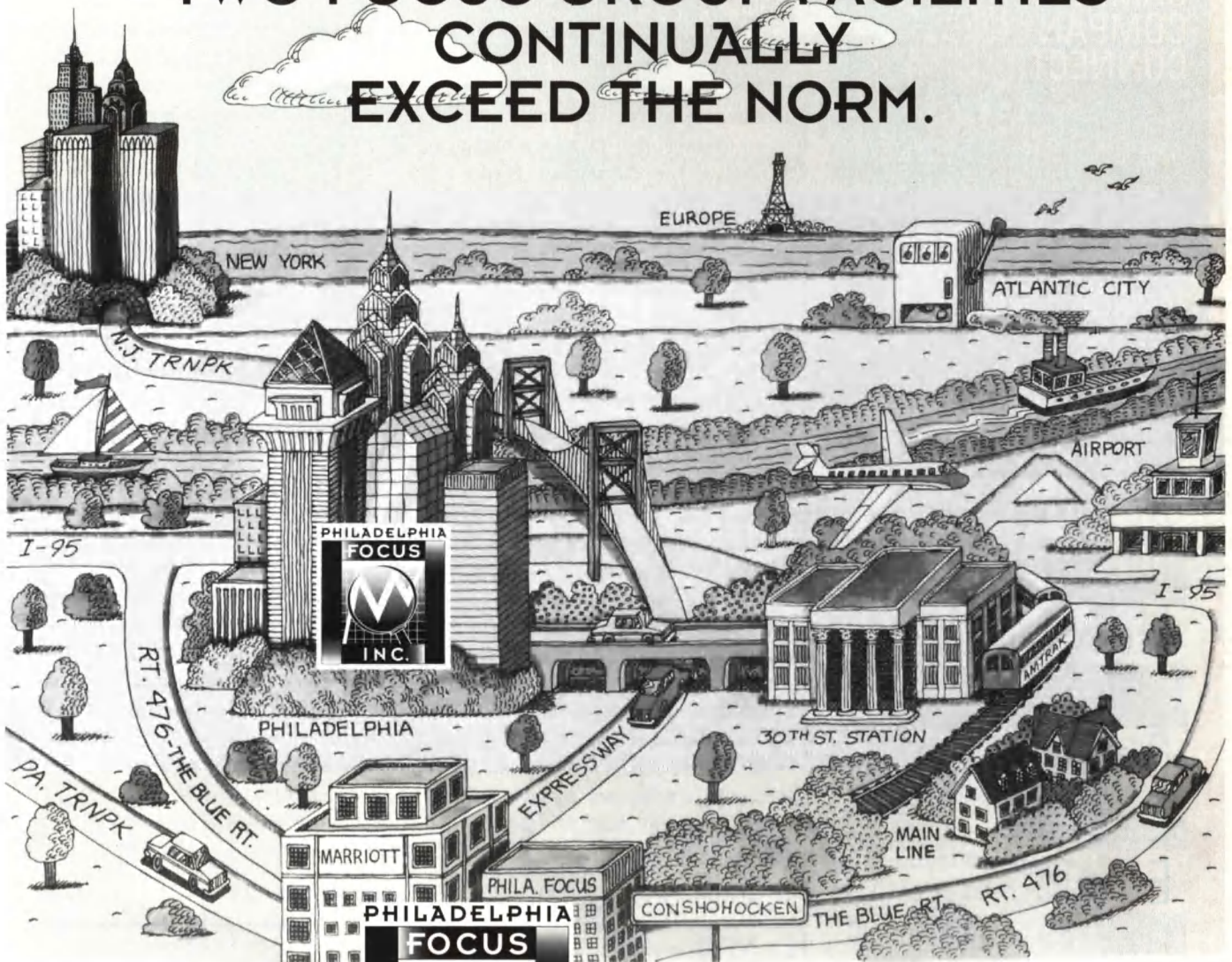
No longer is it sufficient to communicate an idea either verbally or logically. Consumers are becoming extremely adept at interpreting visual messages, symbols and tonality. Whatever is perceived as the intended message is reinforced or contradicted by the message context.

For instance, when a long distance telephone company promises "25 percent savings" in its ads, the consumer actually sees a message context that says there's a lot of competition (or warfare) between the telephone companies.

Note: These between-the-lines impressions have always existed. What's different today is, in the clutter and unimaginativeness of intended messages, these contextual cues are actually becoming the dominant message that registers.

c) Relevance. It used to be that you would try to convince a consumer that your product is better, more effective,

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of higher quality, more sophisticated, or has a unique feature. Once you knew that your ad would change the right attitudes among target consumers, you would expect consumers to act upon your ad.

In today's cluttered communication environment it has become very hard to make consumers even consider what you tell them. Consumers have become quite selfish when exposed to an advertisement. They want to know what's in it for them. They don't necessarily accept attitude-changing cues or messages, unless the advertiser also shows how it applies to them personally.

For example, in order for a message to be relevant, the viewer, reader or listener must personally identify with whatever feelings or events are shown, or perceive personal benefits (like feeling smarter or being "with it") as part of the offer.

d) Relationship. It never was very realistic to expect that advertisements would persuade the viewer to purchase a product just from seeing the ad, but this idea is implied in the traditional persuasion scores.

From qualitative observation of consumer response to advertising, we have derived a clearly observable precursor of behavior which we call "relationship." A successful ad moves people closer to a product, brand, service or idea. In the case of negative advertising, a successful ad creates distance between the consumer and what is under attack.

Depending on the product category, this sense of relationship may manifest itself differently:

Nurturing a sense of relationship is rewarding to people. They feel better about themselves when they act upon something (go somewhere, buy something) they feel close to. Also, a sense of relationship helps people select a brand from the competitive array. They choose the brand they relate to.

The reason negative advertising is so effective is that negative ads destroy people's sense of relationship. Negative information about a political candidate or a brand undermines the opportunity for nurturing a sense of relationship. Only those who already have a strong sense of relationship to a brand or a candidate remain unaffected. All others become less likely to buy or to consider the advertised product.

**Techniques and procedures based on the new criteria**

a) Measuring receptivity. The best indication of receptivity to advertising is unaided recall of advertising shown in the real world, advertising that was on the air, in print ads, newspaper inserts and coupons.

This type of recall can be measured quantitatively with telephone interviewing and qualitatively with personal depth interviews or group interviews.

In quantitative interviewing, it is especially important to create multiple opportunities for consumers to remember advertising. A single direct question ("What is [BRAND] advertising?") isn't enough.

Relevant recall may come in response to a variety of questions, such as . . .

What's new in (CATEGORY)?

Manifestations of "Relationship"	Example
Affinity	A successful fast food commercial reinforces a sense of loyalty (belonging, feeling at home there) among its customers.
Consideration	A successful automobile ad creates a sense of "wanting to go look at and consider that car" when I'm in the market.
Acceptance	A successful beer commercial creates a sense that "The next time I'm offered brand ____ I'll appreciate it."

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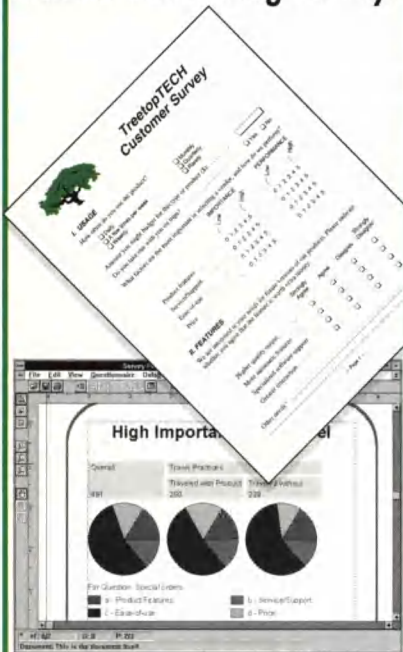
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What are the leading brands in (CATEGORY)?

When you think of (BRAND) what comes to mind?

What do you like, and what don't you like about (BRAND)?

What do you see or hear in (BRAND)'s advertising?

The point to remember is that different people will mention something that is in the advertising in response to different probes. Only if you look at the responses to a combination of questions will you be able to identify whether a respondent was receptive to a specific ad or a campaign.

When testing samples of direct mail (where receptivity is essential) we like to create a situation where we can observe respondents to see if they are receptive. For example, you give respondents an envelope with a brochure and letter assembled in the manner in which it is mailed, and ask them to act as they would at home if this envelope was in their mail. (If the respondent indicates s/he would toss the envelope unopened, ask why, then ask them to open it anyway.)

Often, this simple approach shows that some pieces capture attention. The respondents become receptive. They get into the message and spend some time looking the material over. Other pieces create a lukewarm reaction. The respondent is done looking it over in a matter of seconds.

Some respondents show they are confused, keep trying to get what the message is about (to please the interviewer). Usually, when we ask, "Would you have looked at this brochure as long if you had received it at home?" the answer is an emphatic "No, I would have tossed it a long time ago."

b) Total communication. Much of the insight about the importance of what is communicated by message context derives from qualitative interviewing. Projective techniques and exercises are especially useful to get at what people clearly see in advertising but don't expect you to be asking for.

To make this point clear to respondents, we use a technique called Tan-

dem Team Interviewing. In this approach, there are two moderators. One moderator is introduced to the respondents as the "direct" person, asking straightforward, logical (left-brain) questions. The other moderator is introduced as the person who will lead the group in exploratory exercises using questions that take some imagination to answer.

Separating these interviewer roles has several advantages. First, ordinary consumers are quite willing to be daring and uninhibited with one person, so long as they have the safety net of the other moderator to express their more rational self.

Second, clients find the dual moderator approach easy to follow. When

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*Much of the insight about the importance of what is communicated by message context derives from qualitative interviewing. Projective techniques and exercises are especially useful to get at what people clearly see in advertising but don't expect you to be asking for.*

---

the "logical" moderator is leading the sessions, they can expect to hear what is perceived as the overt, intended message. When the "non-logical" moderator is leading the sessions, the client can listen from a different perspective, to find out what consumers are reading between the lines.

c) Relevance and relationship. For advertising to be relevant and to generate a sense of relationship in the consumer, it is necessary to really understand how consumers relate to the product category and the brands in the category.

One of our favorite techniques of exploring how people relate to products and brands is called collage research. Typically, this is done in fo-

cus group settings.

We ask qualifying respondents to make and bring to the group a collage of whatever they can find that represents themselves, their lifestyle and how they feel about a particular product. Usually, respondents do this with magazine pictures, but personal material may be used as well.

In these groups we do a variety of exercises, asking respondents to:

- describe the creator of the collage just from looking at the collage (We then have the creator of the collage comment on the group's insights.);
- find the common threads in all the collages;
- speculate how collages would change if they were made for a different brand in the category.

This type of probing, as well as any good exploratory research, should provide a clear blueprint for what creates relevance and on what feelings a sense of relationship should be based. Knowing these factors, it becomes possible to include them when measuring the impact of advertising.

### Conclusion

Developments in advertising styles, and redefined roles for advertising in the marketing mix create the problem of how to define, in researchable terms, what the advertising is supposed to accomplish. Some of the goals of advertising have become difficult to define in easily quantifiable terms.

While much of contemporary advertising research appears to be aimed at enhancing the efficiencies of media weight and mix, the main consideration for advertising is whether you have something to communicate that target consumers will be receptive to and are likely to act upon in some fashion.

This article has attempted to show examples of ways to define some of the new goals of advertising into qualitative research criteria. Such criteria can be applied to assess whether an individual ad, an advertising theme or campaign accomplishes does what it was designed to do. □

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## Super Bowl advertising: What really works?

By Don Bruzzone and Paul Shellenberg

*Editor's note: Don Bruzzone is president of Bruzzone Research Co., Alameda, Calif. Paul Shellenberg is the firm's director of sales.*

Once a year almost half the U.S. population sits down to watch the same program, the Super Bowl. But they are also watching scores of brand new commercials — which makes them the world's largest available test panel!

They think they are just watching a football game. So this enormous panel is perfect for research. There has been no forced exposure, no pre-sensitization and no strange surroundings to contaminate results. The commercials they are watching are produced by the best and the brightest in the business using immense amounts of money. Could you devise a better opportunity to learn what works and what doesn't?

With that in mind, our firm, Bruzzone Research Co. (BRC), started testing Super Bowl commercials five years ago. We've been doing it every year since. The following is a brief recap of what we have done and what we have learned.

People can forget advertising very rapidly. So we wait a week or two before checking to see if it is still having a measurable effect on them. When we

do contact them we want to use something that gets through to virtually everybody, everywhere, on the first try. With today's busy lifestyles, voice mail and answering machines, the telephone was not our method of choice. Besides, we want to show them something. We do a lot of this type of ad tracking by approaching people at random in malls.

But in this case we wanted to reach all types of people everywhere, and we wanted the number who decline to participate to be as small as possible.

We accomplished all these objectives by mailing questionnaires to a nationwide sample drawn from all households for which an address is available from either an auto registration or a tele-

Please look over these pictures and words from a TV commercial and answer the questions on the right.

((Music in background) Herds of horses galloping across desert landscape.)

(Two herds of horses meet over a football. The football is put into play.)

(Horses continue football game.)

(Football is kicked over wire between two telephone poles.)

(Two cowboys leaning on fence watching horses play football.) (Cowboy #1) They always do that? (Cowboy #2) Nah! They usually go for two.

(Horses gallop off into sunset.)

[Name] \_\_\_\_\_

Do you remember seeing this commercial on TV? 

05.  Yes     No     Not sure-I may have

How interested are you in what this commercial is trying to tell you or show you about the product?

06.  Very interested     Somewhat interested     Not interested

How does it make you feel about the product?

07.  Good     OK     Bad     Not sure

Please check any of the following if you feel they describe this commercial.

08. <input type="checkbox"/> Amusing	09. <input type="checkbox"/> Familiar	10. <input type="checkbox"/> Pointless
<input type="checkbox"/> Appealing	<input type="checkbox"/> Fast moving	<input type="checkbox"/> Seen a lot
<input type="checkbox"/> Believable	<input type="checkbox"/> Gentle	<input type="checkbox"/> Sensitive
<input type="checkbox"/> Clever	<input type="checkbox"/> Imaginative	<input type="checkbox"/> Silly
<input type="checkbox"/> Confusing	<input type="checkbox"/> Informative	<input type="checkbox"/> True to life
<input type="checkbox"/> Convincing	<input type="checkbox"/> Irritating	<input type="checkbox"/> Warm
<input type="checkbox"/> Dull	<input type="checkbox"/> Lively	<input type="checkbox"/> Well done
<input type="checkbox"/> Easy to forget	<input type="checkbox"/> Original	<input type="checkbox"/> Worn out
<input type="checkbox"/> Effective	<input type="checkbox"/> Phony	<input type="checkbox"/> Worth remembering

Thinking about the commercial as a whole would you say you:

11.  Liked it a lot     Disliked it somewhat  
 Liked it somewhat     Disliked it a lot  
 Felt neutral

\* We have blocked out the name. Do you remember which brand was being advertised?

12.  Coors     Miller  
 Budweiser     Don't know

Does anyone in your household drink this type of product?

13.  Regularly     Occasionally     Seldom or never



phone listing, six days after the Super Bowl. Each household receives questionnaires for 20 commercials (a sample is shown on facing page). Each page shows a photo board of the commercial with all references to the advertiser masked out, and BRC's full battery of diagnostic questions. They are filled out and returned by 37 percent of the recipients — a higher completion rate than you will normally encounter in either telephone or mall intercept interviewing.

For each of the 160 Super Bowl commercials aired during the 1992, 1993, 1994 and 1995 games, reports were obtained from 302 to 365 individuals. At the time this is being written, we are in the process of conducting our 1996 research on 40 additional Super Bowl commercials, bringing the total to 200. Assuming the same response rate as prior years our database will soon consist of 66,000 individual reports on Super Bowl commercials. The results from the research have been voluminous but basically they show the value of the advertising on four levels:

**First: How many noticed the commercials?**

The best-remembered commercials from 1992 to 1995, and the percent of our respondents that recognized them were:

Pepsi: Shaq vs. Small Boy (1994) .....	77 percent
Diet Pepsi: Ray Charles "Hearing" (1992) .....	77 percent
Columbia Pictures: "Few Good Men" (1993) .....	73 percent
Pepsi: Cindy Crawford "Boys on Fence" (1992) .....	67 percent
Chevy: Metal balls falling on pick up (1994) .....	66 percent

Not all Super Bowl commercials were this fortunate. Recognition of the bottom five ranged from 3 percent to 13 percent, showing a surprisingly wide range in recognition scores for commercials that had all appeared on the Super Bowl a few weeks earlier. Airing a commercial on the program with the biggest audience is no guarantee people are going to notice it.

Recognition provides the best measure of intrusiveness because it is the

continued on p. 52

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## Marketing research: On the threshold of opportunity?

*A roundtable discussion on the past, present and future of research*

“Changes in society, family structures, and consumer attitudes have created a state of uncertainty which challenges the role of research in business as never before.” These words brought over 200 marketing research professionals from across the world to La Jolla, Calif., on January 21-24 for the American Marketing Association’s Attitude/Behavioral Research Conference. The theme of the conference, Leveraging Today’s Knowledge for Tomorrow’s Success, included sessions on global brand equity, reengineering the research function, and training issues for the future.

During the conference, on behalf of QMRR, Valerie Crane, a partner with The Capstone Group, San Diego, interviewed a panel of five senior executives of major research organizations to discuss where the industry is heading and what challenges or opportunities face us as we go down this as yet uncharted road.

The panel members were:

Diane Bowers, president, Council for Marketing and Opinion Research (CMOR) and executive director, Council of American Survey Research Organizations (CASRO).

Leona Foster, vice president marketing research, American Marketing Association (AMA).

Howard Gershowitz, president, Marketing Research Association (MRA).

David Gordon, chairman of the board, American Marketing Association.

Michael Naples, president, Advertising Research Foundation (ARF).

**Crane: What are some of the challenges facing the**

**research industry today?**

Michael Naples: “The business environment is what challenges us; the lack of investment in research by certain segments; the disinvestment by downsizing the number of people. We’ve just come through five years of recession and less spending. We may be coming out of it and perhaps technology will help save us.”

Howard Gershowitz: “One thing we’re facing is privacy issues — privacy is important to the family, but what we do [as an industry] is important too. If privacy legislation comes in like it has in Europe, it’ll be a challenge for this industry.”

Diane Bowers: “People fear change. Fear of change, just in and of itself, will keep some people from moving. There’s a group within the research industry that says, ‘This is the way it should be. If we change from that, then we’re destroying the integrity of the research process.’ I don’t agree with that. It doesn’t mean that you throw away the principles. You’ve got to grab onto the principles that you need to carry forward, but leave some of the traditions behind that may not work in the 21st century.”

Gershowitz: “Technology has allowed things to happen faster. Yet the level of stress is probably greater than ever. We’ve always been a knowledge-based industry. My clients are expecting the data that much quicker. There isn’t a clear delineation of responsibility from the data collection perspective. We’re asked to do that much more. We have the information available and available quickly. So therefore [our clients say], ‘If you can give us x, why not give us x+y?’ ”

Leona Foster: “We’re finding in our business now that

our clients have been moved over from some other background and they need training — anything from the basics of sample design to questionnaire design. It's just the basics. Getting them up to speed. That's where we're spending most of our time."

David Gordon: "We've got fewer people working with more projects. The study ARF did with AMA in 1993 indicated that over a five year period budgets were up 28 percent and staffs were down 36 percent. If you divide the 128 by the 64, you find out whoever's left in the research department is being asked to do twice as much as they were five years before. Where this nets out in the training aspect is that people don't have time. It isn't even a financial issue. They don't have time to attend conferences, to go to meet with their fellow professionals through various luncheons. So there's less contact and they're less and less in touch. And to Leona's point, a lot of these people didn't work their way up the traditional research ladder. They've been moved in from some other area."

**Besides the challenges are there also opportunities?**

Bowers: "I think we're on the threshold of opportunity. There are two philosophies: the glass is half empty or the glass is half full. I look at it as half full. We should be taking a major leadership position in how information is accessed, how it's disseminated, how it's used, and how it balances those very critical issues of information gathering and individual privacy. So we could be right on the threshold of being considered in the forefront of leadership."

Naples: "The research provider side has developed into a much more capable part of the business. In different times there have been different parts of the business that have been stronger than others. In the early days it was the advertising agencies that really built up their capabilities. Now it's the age of the research company. To the extent that research companies can handle their part and pull this off with strong R&D, with valid techniques, and build credibility with clients, is the extent to which the business can grow."

**What do you see on the technological horizon that will change how marketing research is done?**

Naples: "There's a lot happening now. We're in a transition period. There's going to be a lot of opportunity for research with the Internet approach. We old-time researchers are skeptical about the extent you can use a self-selected sample and make something of it. But we're all attuned to the fact that any new capability carries with it less than complete satisfaction, like the telephone interview when it first started. But over time, the telephone interview became not just important but dominant because of its inherent capabilities. The Internet has the potential to, once it reaches critical mass, be a vehicle for certain types of research."

continued on p. 56

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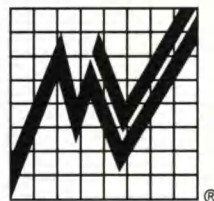
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## Survey Monitor

continued from p. 6

Roper Starch Worldwide Inc. The survey found that, despite the recent slowdown in sales, nearly one in four (21 percent) families with children

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under the age of 12 plan to buy a new car in the next two years, compared to 16 percent of non-parents. And marketers should take note: 39 percent of America's 12 million "Parenting Leaders" (what *Parenting* and Roper have identified as the most quality conscious, brand loyal and civic minded of parents with kids aged 12 or younger) say they plan to buy a new car by 1997.

The survey, conducted for *Parenting* by Roper Starch Worldwide polled 602 parents about their vehicle preferences and shopping habits. Among the key findings:

- At a time when sales of used cars and leasing programs are on the upswing, *Parenting* Leaders are one of the few groups in which the majority buy new cars. More than half (51 percent) of *Parenting* Leaders say they purchased their cars new, versus 40 percent of all other adults.

- An overwhelming majority (77 percent) of *Parenting* Leaders say automobile safety is "extremely important" in their choice of a new car, versus 64 percent of the general public.

- *Parenting* Leaders are twice as likely as the general public (18 percent vs. 10 percent) to own a sports utility vehicle; 15 percent of them own a minivan, versus 6 percent of the public.

*Parenting* Leaders are both happy and skeptical customers of the automobile industry. They are far more likely to say their next car will be from the same manufacturer as the car they drive most often (34 percent vs. 27 percent). Yet, they are more than cautious of the people who sell them their cars. Copies of the complete *Parenting*/Roper Automotive Survey are available by calling Lynn Landano at 212-522-9811.

## Olympics big with teens around the world

The Olympic Games, which includes many of teens' favorite sports, is the single most popular sporting venue among teenage boys (71 percent) and girls (62 percent), according to The New World Teen Study, a survey of 6,500 teens conducted in 26

countries by The BrainWaves Group, a New York global consulting and trends company.

"The Olympics are young people's favorite athletic package because in the global teen culture sport is a dominant theme, with boys and girls both active participants and spectators," says Elissa Moses, managing director, The BrainWaves Group.

In the U.S., 71 percent of teen girls and 68 percent of teenage boys named the Olympics as their favorite televised sports competition. Globally, the Olympics enjoys its highest popularity rating in the Middle East where it is the favorite of 85 percent of both teen boys and girls. Australia follows in third, where the Games are the favorite of 84 percent of the males and 80 percent of teen females.

However, any similarity between the tastes of teen boys and girls ends with the Olympics. A majority of teen boys (63 percent) cite basketball as their favorite sport followed by soccer in third (58 percent). In fact, on a global basis, basketball is teens' overall favorite spectator sport. Swimming is the overall teen favorite sports activity according to 52 percent of those surveyed.

Teen girls voted gymnastics their second most popular sport (57 percent), followed by basketball (51 percent). But only 17 percent of the boys voted gymnastics their favorite spectator sport.

## The U.S. and Sweden have the highest Internet awareness

A series of consumer surveys conducted across Europe and the United States has found growing awareness of and interest in using the Internet. Research carried out in July by a group of affiliated market research firms, the International Research InstituteS (IriS), found that while the U.S. had the highest overall level of Internet use, consumer support of the Internet in some European countries was surprisingly strong. Despite the high level of personal computer use in the U.K. and Germany, the highest levels of Internet use were found in

Scandinavian countries, particularly Sweden.

The group completed between 500 and 1,300 consumer telephone interviews per country to measure awareness and use of personal computers communicating across the Internet. In both France and Germany, roughly three-quarters of those surveyed were unfamiliar with the Internet, and fewer than 3 percent had personal experience with the Internet either at home or at work. In contrast, almost half of those surveyed in the Netherlands and over 70 percent of those surveyed in Sweden had heard of the Internet.

According to Damien Schnyder, president of IriS, the U.S. leads the world in general consumer use of the Internet, although surfing the Net is still more often done at work than at home. While 8.4 percent of U.S. consumers surveyed use the Internet at the office, 5.7 percent use it at home. Roughly four in 10 of these home users are "Internet Intensives," says Schnyder, because they use the Internet both at home and at work. Similar Internet use was seen among European Internet users as well. For more information call the IriS Central Office in Brussels at 32-2-344-3581 or fax to 32-2-343-9828. E-mail 100517.3211@compuserve.com.

## Teen spending on the rise in '95

U.S. teens will have spent a projected \$109 billion in 1995, representing a 10 percent increase (not inflation-adjusted) over last year. Teen spending has increased each year since 1993.

These are among the findings in a new survey by Teenage Research Unlimited, (TRU), Northbrook, Ill. It polled 2,034 demographically selected respondents, ages 12 through 19. Teen spending of their own money (i.e., money teens earned or received from allowance, gifts, employment, etc.) has increased over last year: Teens will have spent \$67 billion of their own funds in 1995, compared to \$63 billion in 1994. Teen spending of family dollars has similarly increased: Teens in 1995 will have spent \$41 billion of family money, compared to

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\$36 billion spent last year.

"The biggest reason why total teen spending is up is that teen spending of family money is sharply rising," says Peter Zollo, TRU president. Historically, "teen spending of family money correlates to the state of the U.S. economy, while teen spending of their own money is more recession-proof," he says.

Boys and girls spend virtually the same amount of money a week in total — \$67 spent by males, \$65 spent

by females. In the past, males spent more of their own money, and females spent more family dollars. For the first time in several years, however, males and females spent approximately the same amount of family and their own money in 1995.

Teens in 1995 will have a combined income of \$102 billion, which amounts to a 6 percent increase from last year. Last year's combined income was \$96 billion.

The major sources of teens' income

are: parents on an as-needed basis (46 percent); occasional jobs (46 percent); regular allowance (29 percent); part-time jobs (26 percent); and full-time jobs (11 percent).

Zollo reported that the gap in earnings between males and females has closed significantly this year; for example, last year, males earned roughly \$18 more per week than females. This year, the difference in income between males and females has narrowed to \$5. Older teens continue to earn dramatically more money than younger teens.

Zollo also says that besides earning and spending "significant sums," teens know how to handle money. Sixty-six percent have savings accounts, one in five teens have checking accounts, 17 percent own stocks or bonds and 5 percent have mutual funds. Additionally, 41 percent of teens are interested in getting a credit card in their own name, 37 percent of teens aged 18-19 already have a credit card in their own name, and 12 percent of total teens say they have access to their parent(s)' credit card.

For the fourth consecutive year, the 12- to 19-year old population has increased in the U.S. There are currently 29.1 million U.S. teens — compared to 28.5 million last year — representing a 2 percent rise. The increase represents a trend: As more kids of the baby boomers reach their teen years, this teenage demographic group is projected to continue to grow until at least the year 2010. For more information call 708-564-3440.

## Top California retail markets announced

The rankings of the best and worst performing retail markets in California during the five year period 1989-1994 were released today as part of the 1996 edition of the California Retail Survey, published by the Sacramento-based market advisory firm of the same name. The Survey's rankings show that the top ten markets expanded at annual rates in excess of 40 percent during the last five

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years. The fastest growing local retail market is Palmdale, with local retail sales up by 132.3 percent since 1989. Following Palmdale are the cities of Clovis, Moreno Valley, Roseville, and Fountain Valley, each with retail sales growth in excess of 40 percent during this five year period. By comparison, statewide retail growth during this five year period equaled 1.2 percent. To be included in the rankings of "major markets," a city must have 1994 retail sales in excess of \$500 million.

Thirty-one major California markets had negative growth in the past five years. The worst performer was the City of Downey, which saw its retail market contract by 18.4 percent, representing a sales decline of \$146.5 million.

Among the thirty-four retail markets in the state that have retail sales in excess of \$1 billion, the City of Santa Clarita was the best performer, with a growth rate of 43.8 percent. Other billion dollar markets that rank high include Thousand Oaks, Cerritos, Bakersfield, and Redding. Among these billion dollar markets, the City of Long Beach had the worst performance, with a sales decline of 14.7 percent. The City of Los Angeles, the largest market in the state, saw its retail market decline 5.9 percent, representing a drop in sales of \$1.05 billion over the last five years.

Retail sales and outlet data used in the survey are derived from tax returns filed by each of the 333,000 retail establishments in California. The survey is available directly from the publisher at 916-486-9403.

## Latin dress trends and codes

Anyone ever seen a Latin American woman wearing tennis shoes on her way to work? Probably not. According to an article in *Latin America Perspective*, a newsletter published by Market Development, Inc. (MDI), San Diego, it's a look reserved for New York female executives. Latin women almost always prefer high

heels. When considering working women in the Americas, the female shoe consumer profile varies drastically throughout the region. However, the demand for a comfortable, professional-looking wardrobe is increasingly similar for all.

In Latin America, the increase in women joining the workforce is already generating growth in the casual apparel market in the middle and upper-middle price range. Data show Latin women in Mexico and Argentina look to the U.S. for elegant and practical clothing: the multi-purpose outfit, informal but not too casual. While seasons and sizes in Latin America tend to be different from those in the U.S., American imports fit comfortably into the style of middle- and middle/upper-class Latin women.

On the quality/style/price scale, American clothing reportedly falls between the cheap/low quality products from the Far East and the high-end European designer imports.

Comfortable clothes that look good tend to be primary considerations when Mexicans pick what to wear, followed by fabric type and durability. According to the MDI Mexico Poll, almost 90 percent of Mexicans consider comfort as a priority when selecting clothing. Data also seem to support the "dress to impress" attitude common among many Latin consumers. Wearing clothes that look good tends to be important to 73 percent of Mexicans, with women feeling quite strongly about this issue. Also, more than two-thirds of respondents agreed that looking the best is a priority, while only one-fourth concurred with the statement "clothes shouldn't call attention to one's self."

Among other findings, one-third of respondents considered keeping up with fashion to be important. As for shopping, buying clothes seems to be a "planned" event for the majority of Mexicans (only 14 percent stated buying on impulse) while an overwhelming 83 percent do not consider shopping for clothing to be a chore. For more information call 619-232-5628.

## Understanding Hispanics' lifestyles, values and culture can mean the difference between Hispanic marketing success and failure.

Hispanic Market Connections, Inc. is a bilingual, bicultural full service market research firm that provides insightful and strategic analysis in qualitative (focus groups) and quantitative marketing studies with Latino consumers.



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## Product & Service Update – In-Depth

# Test packaging changes instantly with computer simulator

By Arlander Card and Kavita Card/i<sup>2</sup> -Information Innovation, Kansas City, Mo.

Consider this hypothetical situation: The Great Tea Rose Company has been marketing the highest quality tea roses for decades. However, in the past year, they had noticed a decline in sales. This was difficult for the marketing team to understand as their product had not changed and there were no significant changes in the marketplace. After brainstorming on the problem, they decided that changing their packaging would help boost sales.

Their creative department was challenged with producing alternate product packaging options. They came up with a variety of different packaging including larger tea roses, smaller tea roses, brighter colors and pale colors and provided it to the marketing team. However, prior to conducting a quantitative packaging test, they

decided that they wanted consumer input with the creative. They also decided that they wanted consumers to “show” them how to optimize the revised packaging so that it best suited their needs.

The marketing team decided to hire a company that offered a product that married computer graphics technology with projection technology with consumer focus groups. They expected this product to help them optimize the current packaging by modifying package graphics, colors, hues, textures, package verbiage, designs, etc., at will by participants during groups.

So, they traveled all over the country, moderators and computer projection product in tow, and listened and

continued on p. 63

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## Product & Service Update

continued from p. 8

moderate income areas. An option allows minority composition to be assessed along with income. The system allows access to nearly 100 demographic, consumer demand and business data variables used in the analysis. When CRA-sensitive areas have been calculated, reports and maps are automatically generated for the assessment area. Users may generate pure thematic maps, one variable at a time, pie charts to display the relationship between two variables in a tract (such as loans and deposits), or a combination of thematic mapping with customer point data displayed to illustrate the exact location of loan customers against market data. For more information call 619-677-9568.

## Study the U.S. by ZIP with CACI CD-ROM

CACI Marketing Systems, Arlington, Va., introduces Sourcebook•America, a CD-ROM product containing demographic information on the U.S. The program allows users to study the entire U.S. by ZIP code or county, using over 50 demographic variables for 29,523 residential ZIP codes and 3,141 counties, and by MSA, ADI and DMA. The Windows-compatible program features purchase potential information for 20 product categories, from investments to sporting goods, and is designed for comprehensive searches, queries and sorts of the data. For more information call 800-292-CACI.

## Internet survey firm debuts Web page

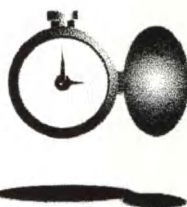
DataStar, a Waltham, Mass., data processing firm, now offers its Internet Survey Service for the World Wide Web. Those interested may access the firm's Web page at

<http://www.std.com/datastar/> for a description of the firm's list of services, information about the Internet service, which offers survey administration on the Internet, and a sample survey. DataStar's service can determine who is dialing into your Web site and what they think about it. For more information call Ellie Smerlas at 617-647-7900.

## Newsletter focuses on competitive research on-line

BiblioData, Needham Heights, Mass., publisher of Fulltext Sources Online, has introduced a new monthly newsletter covering the use of the Internet for business research and competitive intelligence. *The CyberSkeptic's Guide to Internet Research* takes a critical look at research sources, targeting Internet

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users who are familiar with professional on-line vendors like DIA-LOG and NEXIS. The newsletter can be ordered directly from BiblioData by calling 617-444-1154.

## New mystery shopping service from Maritz

Maritz Marketing Research Inc., St. Louis, Mo., has introduced Virtual Customers, a new fully-integrated service quality evaluation system us-

ing mystery shoppers. The system involves seven steps that help clients integrate the voice of the customer in their organizations: definition — helping determine measurable service quality specifications; prescription — defining behaviors, communicating standards and educating employees about expectations; certification — extensive training of shoppers as certified “customers” of the client organization; execution — actual visits by virtual customers who record their

“moment of truth” experiences; reporting — 24-hour topline reports showing individual and aggregate service levels; integration — incorporating Virtual Customers into the overall customer satisfaction process as an additional listening post; and strategy development — helping design and integrate improvement strategies throughout the organization. Maritz uses a project management system to track the skill level and demographic information on each virtual customer. The database shows each person’s shopping performance, past experience and other pertinent information to ensure that the right people are assigned to each project. The same system can produce real-time feedback on the status of the project, how many locations have been visited, and current ratings compared to previous visits. For more information call Phil Wiseman at 314-827-1610.

## Geocoding update

Qualitative Marketing Software Inc., a Clearwater, Fla., maker of geocoding and address standardization technology, has announced that StarData and GeoStan Library are now available with Geographic Data Technology’s (GDT) Dynamap/2000 street network database. StarData’s engine, coupled with GDT’s street network database, will provide a full-featured nationwide solution to address standardization and geocoding needs. For more information call 813-725-9727.

## Caliper announces Maptitude, U.S. Streets Data updates

Caliper Corp., Newton, Mass., has added 1990 Block Group Areas and 1990 Block Centroids to the library of Maptitude data products. These new data files augment the geographic data that is packaged with the Maptitude Geographic Information System, providing access to demographic data for detailed geographic areas across the U.S. The Block Groups file and Block Centroids file

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support demographic mapping and analysis for many business applications. The company has also released an update of its U.S. Streets Data CD. The new CD stores a complete nationwide street file with associated address information for use with Maptitude. The new U.S. Streets file includes over 32 million street segments with enhanced street names, address ranges and ZIP Codes. These enhancements incorporate updated information from the U.S. Postal Service. For more information call 617-527-4700.

## Reports on U.K. firms now available on MarkIntel

MarkIntel, an on-line service offering 45,000 market research reports, has added the reports of MSI, a British firm specializing industrial and business-to-business coverage of European markets. Derived from original research by its in-house research

team, MSI provide marketing planning, benchmarking and forecasting information. Reports include such topics as: two-year production and consumption projections for the U.K. food and beverage packaging industries; the impact of forecasting EU legislation upon the European process industries; the five critical success factors in the U.K. industrial storage tank industry; and the French concrete construction growth forecast through 1998. For more information call 800-662-7878.

## Easier access to SIC Codes with new version of SIC Infobase

Users of Standard Industrial Classification (SIC) Codes may want to check out the new Windows version of SIC Infobase, a software program developed by Wandell Graphics and distributed by the National Technical Information Service, U.S. Dept. of

Commerce. The Folio indexed version of the SIC provides seamless integration into business applications including word processing, spreadsheets, graphics and traditional database management programs. Searches are completed quickly with results easily integrated into other computer applications. Users can access information, tabulate and compare files, use hypertext links, develop customized query links and launch other applications. SIC Infobase requires an IBM-PC or compatible with 512K RAM and DOS 3.0 or later. For more information on this and other SIC Infobase products call 703-487-4140 and enter product #8235.

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My sales staff returns calls ASAP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My company image is positive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My receptionist is courteous	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our products are a good value	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We charge a fair price	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clients will return again	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Knowing what customers think is important	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I can't spend a fortune finding out	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I need to know right away what they think	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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## Data Use

continued from p. 17

market awareness, preference and price sensitivity for his sub-brands along with major competitors. We conducted the study disk-by-mail and were soon delivering top-line conjoint results.

Our client was skeptical when he saw that conjoint reported that one of their newly released brands, we'll call it "FastPC," was beating their well-established brands hands down. He insisted this couldn't be right and that we check the data. We did — somewhat nervously, I might add — but found no errors. In the meantime, he called his sales department for a sanity check. Sales reported that the FastPC was flying off the shelf. FastPC had exceeded all expectations.

While this happy-ending story warms us inside, it also illustrates a limitation of conjoint. Conjoint predicts preference, not market share. While the newly released FastPC was selling above expectations, its

*Our client was skeptical when he saw that conjoint reported that one of their newly released brands, we'll call it "FastPC," was beating their well-established brands hands down. He insisted this couldn't be right and that we check the data. We did — somewhat nervously, I might add — but found no errors. In the meantime, he called his sales department for a sanity check. Sales reported that the FastPC was flying off the shelf. FastPC had exceeded all expectations.*

market share at that point still fell short of established brands. Given enough time, adequate promotion and distribution, we'd expect FastPC's market share to more closely align with conjoint results.

Conjoint models do not predict market share due to a variety of reasons, including:

1. Conjoint assumes perfect information. In the conjoint interview, respondents are educated about available brands and features. In the real world, obscure brands have less chance of being purchased. Conjoint cannot fully account for differences in awareness or preference developed through advertising and promotion.

2. Conjoint assumes all products are equally available. One brand is as conveniently selected as another in a conjoint interview.

3. Conjoint respondents might not accurately reflect potential buyers. Many won't have the interest, authority or ability to purchase at the current time.

4. Conjoint results reflect the potential market acceptance of products and services, given proper promotion, distribution and time.

Many researchers quantify factors conjoint cannot account for and build them back into the model using external effects. While this practice typically brings conjoint results more in line with actual market share, it draws us toward a troublesome paradox. As factors are accounted for to more accurately tune the conjoint model to market share, we become more likely to believe we actually have developed a valid market share predictor and more likely to misuse the model. Imagine the potential damage if costly resources are committed based on the assertion that, "It's worth it because the simulator predicts that market share will increase from 17 percent to 23 percent, which translates into an additional \$8.27 million in revenue per year."

That said, conjoint models are excellent directional indicators. Conjoint can reveal product modifications that can increase market share but it will not reveal by how much market share will increase. Conjoint can tell us that the market is 20 percent more price-sensitive for Brand A than Brand B but we do not know the

absolute price sensitivity of either one. Conjoint can identify which market segment will most likely purchase your client's product but not how many units it will purchase.

#### Summary

Conjoint analysis increases the return on research dollars by providing managers with useful, valid information. Conjoint's realism leads to more accurate results, and provides a strategic tool for quantifying brand equity and relative price sensitivity. To ensure success, researchers must carefully set management's expectations regarding what conjoint can and cannot do.

The market simulator is usually the most anticipated deliverable for managers. Don't let this enthusiasm get out of hand. Conjoint simulators are directional indicators which can provide a great deal of information about relative feature importances and preferences for product configurations. Conjoint simulators are not market share predictors. Many other factors such as awareness, distribution, advertising and product life cycles drive market share in the real world. While conjoint models can be fine-tuned to partially account for these elements, we mustn't let managers believe that adjusted conjoint models can accurately predict volumetric absolutes such as market share. □

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## Creative testing

continued from p. 22

other ads. The respondent is given an opportunity to page through the magazine, then asked what ads she or he remembered seeing. Hopefully, one of those will be the client's.

•Physiological Testing Services (such as The PreTesting Co. or Perception Research) — In these systems, a machine is trained on the body. This machine then "measures" consumer reaction to the ad via tracking movement in the respondent's pupil or even the pitch of his or her voice.

The fact is that no matter which system is used, there are certain rules which enable some ads to test better. Two of these rules focus on the message; two of these rules focus on the presentation. After all, one way of beating the system is to find out what works and then use that learning to your own advantage.

### 1. "Keep it simple, stupid!"

The old "K-I-S-S" rule has been around for a while. But nothing could be more relevant for today. Too many

times, agencies try to be clever for the sake of being clever. The result is a "whiz bang" commercial that gets people talking but doesn't make them remember the product that was advertised.

This tends to be a problem at creative-driven agencies. Special effects dazzle consumers, but the medium becomes the message. Creatives sometimes come to believe that they're artists, that they're making mini-documentaries. Unfortunately, they lose track of reality: They're selling soap.

Sometimes the blame also falls on the client who insists on overloading the commercial with "relevant" messages. For example, I once told a client that people could remember "two, just two, support points." So he said, "I've got two points — 'Healthy for you and part of a balanced diet' and 'Low in fat and only 70 calories.'" Excuse me, but I count four claims there. Another client demanded that eight separate points be made about her product. She got a goulash commercial which tested abysmally.

Try this simple exercise: The next

time someone comes up and starts talking to you, listen to what he says for just 30 seconds, while everything else is going on around you. Then, try to play back everything the next day.

### 2. "Tell me news. Provide different/new information."

People are busy today. They don't have time to listen to your messages if you're telling them the same thing over and over again. Thus, before even giving creative people their marching orders, clients and account people should come up with some new information. Again, think about that friend that you're talking to. How long is that friendship going to last when you have the same conversation day after day, week after week, month after month?

Sometimes it's hard to come up with new information about your product. Then, the marketing minds have to work that much harder. If they heard it before, it's not worth repeating. Many, many ads test poorly because they ignore this rule. I had a client who saw her ad testing score nosedive over a two-year period. The first ad broke the (norm) bank; the last ad broke the agency's heart. Fact is, the agency kept making the same ad over and over again.

The information has to seem new each time the consumer sees the ad. That's the challenge — and the scary proposition, given the fact that consumers aren't remembering it because no new information is presented based upon a one time exposure.

### 3. "What's in it for me?"

Clients love their products. They should. Their task in life is to convince everyone to buy from them. However, no product ever sold merely because it was a good product. Any/every product had to fulfill a need for the consumer.

And yet, so many advertisers and agencies spend 30 seconds thumping their chests about they superior they are. But who cares? Consumers really want to know what's in it for them! "How will this product make my life easier/simpler?" "How will I be a better person?" This is not to say that messages should not concentrate on the product. Rather, it is saying that all messages should be consumer-based. One should not talk about a product unless the message has a

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direct relevance to the buyer.

A client will mandate that a new product be "gorgeously photographed on the best china plate." Nice touch, except consumer research showed that most people would eat the product on the run. Another client mandated that her rather-technical telecommunications product be thoroughly explained. It was — although people never figured out when to use it. Years ago, I worked on a commercial for a spaghetti sauce. We used vintage silent film clips of people comically eating spaghetti — as it spun off their forks, into the laps of other surprised onlookers. Moms immediately recognized what was in it for them and they called the client immediately. The commercial was on the air less than one weekend.

#### 4. "I want to see me!"

H.L. Mencken has been quoted many times over: "No one ever went broke overestimating the intelligence of the American people." Maybe that's why more marketers aren't rich. Too many marketers try to sell their products by portraying "ideal" consumers. Maybe they're afraid of being associated with

advertising that shows real consumers, the people who are really going to buy the product.

That's why there's always skinny babes selling diet stuff. I'm sure beautiful women do drink diet soft drinks, but last time I checked with the secondary sources, significantly more diet soft drinks are consumed by people with more of a weight problem.

We once tested two commercials for two different products. In one, a young consumer was pictured in a Laundromat trying to do his laundry, next he was shown trying to microwave a meal. Consumers made the connection: "Yeah, somebody like that would buy those things." A few months later, we made another commercial for a low-fat dessert. The presenter was a petite young woman, who probably never weighed more than 90 pounds soaking wet. Consumers never made that connection. "Why would that skinny young thing be eating low fat stuff?"

The fact is, consumers want to see themselves in your commercials. They want to crawl inside their television sets (or their magazines) and see themselves.

They don't want to see their "idealized" selves. "That's somebody else," they say.

#### Conclusion

So, four simple rules for producing advertising that will not only be more fun to watch, but should be more fun when the bills come. Two of these rules focus on your message and two of these rules focus on the execution itself:

1. "Keep it simple, stupid!" — One message is more memorable than several. Truly, less is more.

2. "Tell me news. Provide different/new information." — Tell them something they don't know, that they'll want to hear again and again.

3. "What's in it, for me?" — How will it make my life better?

4. "I want to see me!" — You'll make a better commercial by using the actual people who will be buying your products.

In a nutshell, remember you're talking to real people who want real information about real products that will make things really better for them.

Following these simple rules should help your advertising pass the hardest test of all — the test of time. □

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The story development process is simple: a QMRR writer conducts the necessary interviews by phone and then writes a draft of the story. Because the case histories may touch on sensitive information, we allow interviewees to read a draft of the story before it goes to press. Please contact Joseph Rydholm, editor, for more information or to discuss a story idea.

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## Research partnership

continued from p. 13

Returning to the original scenario, new strategies are being pursued because someone in power has decided they should be. But, is there a sound basis for the decision? In my experience, advertisers and their agencies often tire of an execution or campaign long before it has outlived its utility. Even when the campaign is truly worn out, a new strategy may not be necessary, just some fresh executions.

The decision to scrap an existing strategy should be based on research showing that something else is better or at least as good. Only then should new executions be pursued.

A few years ago an important client of mine, faced with a brand whose impressive sales growth had flattened, challenged his agency to develop "more intrusive" advertising copy. "Intrusive" was defined as copy that would

*A few years ago an important client of mine, faced with a brand whose impressive sales growth had flattened, challenged his agency to develop "more intrusive" advertising copy. "Intrusive" was defined as copy that would get high day-after recall scores. The agency labored, producing numerous rough-live TV executions which, when recall tested, produced unsatisfactory results. Finally, though, they were successful, producing one which set a new high score for the brand. The commercial ran for several flights; sales went down. It was pulled off the air and replaced with the old copy; sales recovered.*

get high day-after recall scores. The agency labored, producing numerous rough-live TV executions which, when recall tested, produced unsatisfactory results. Finally, though, they were successful, producing one which set a new high score for the brand. The commercial ran for several flights; sales went down. It was pulled off the air and replaced with the old copy; sales recovered.

What happened? To find out, we conducted diagnostic copy research to learn what the commercial was communicating to viewers (yes, we should have done this before it ever went on-air, but in the worlds of advertising and market research, the right thing is not always done). The research results were clear — the new commercial com-



municated quite different things about the brand than did the old commercial. It did a very good job of communicating these new things and did so in an ingratiating way (hence its high recall score). Unfortunately, the things it communicated so well had very little motivating power.

The moral to this little story is twofold: vigilance is required to make sure a brand does not drift off strategy; and, changes in strategy should be deliberate and preceded by testing to make sure they are necessary.

**3. Determine what needs to be substantiated.** Many times, new advertising will contain claims that must be proven. It is the researcher's job to be alert to the need for such testing and to recommend ways to accomplish it. This is not always easy.

It is not always immediately obvious that a particular claim needs to be substantiated. Everyone knows a "we are better than they are" claim needs proof. But what about more subtle claims? Would Clairol's historic "Only her hairdresser knows for sure" copy line require a test conducted among hairdressers? Maybe, maybe not.

It is well beyond the scope of this article to discuss the necessary occasions for and methods of claim substantiation, but within its scope is a fourth admonition to researchers, to wit:

**4. Determine when to conduct the substantiation.** The copy development and approval process can get hopelessly bogged down in considerations of how to substantiate a particular claim. Moreover, claim substantiation research can be very costly because of the extensive experimental and quality controls required. The problem is magnified when several different claims are being considered.

A very useful procedure, before any commercial is produced or any substantiation is conducted, is to first test the competing claims for motivating power. Importantly, this would include testing alternate versions of a particular claim, such as:

"The #1 choice of professional pool technicians" vs. "Recommended by professional pool technicians."

The requirements in terms of survey method and sample size (to say nothing of likelihood of success) to support the latter claim are far less onerous than those required to support the former. If the two are no different in motivating power, it pays to use the one less demanding of substantiation.

Such simple persuasion testing of claims can be an important shortcut in the development process, resulting in fewer advertisements being produced and tested, and substantiation of only those claims most likely to be used.

These simple examples show how the researcher, acting proactively, can be an important partner in the advertising development process — suggesting procedures to enhance the effectiveness of the advertising and making the entire process more efficient. □

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## Videoconferencing

continued from p. 11

Bailey says. "We can call and say, wait, don't show that concept, or, have the moderator follow up on that last point. We have the ability to change as we go along, and I think that makes for better qualitative research because you are continually building on the learning.

"We also love the fact that after the group is over we can discuss with the moderator what happened. Especially when you're doing a succession of groups, the moderator can get input from the whole team."

### Helps with quantitative

The agency does both quantitative and qualitative research as part of the strategic development process for new accounts. Once again, it relies on videoconferencing. "Particularly as time pres-

ures are squeezing us, we have to get the quantitative launched and conducted faster because we like to do the qualitative before we go into the quantitative. Being able to get our groups done in a couple parts of the country and get immediate information means that we can then get our quantitative in the field sooner. And if something comes back from the quantitative that we want to explore with the consumers, we can get groups recruited in several parts of the country in a short time," Bailey says.

Videoconferencing was instrumental in developing new business pitches to snare the Burger King and MasterCard accounts, Bailey says. In the Burger King example, a committee of franchisees was given the task of choosing a new agency. Similarly for MasterCard, key bank members of the MasterCard user association

were charged with picking the winner of the MasterCard account.

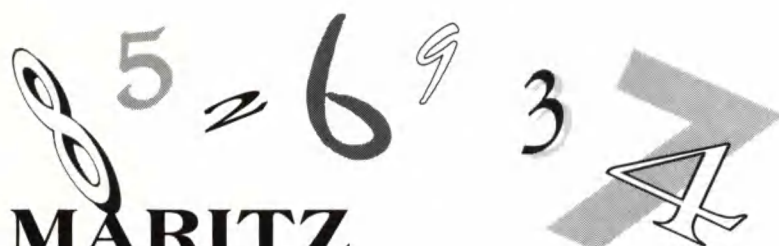
The agency conducted at least a dozen focus groups across the country using FocusVision, with the goal of showing the prospective clients that the agency's strategy had been tested before consumers all over the U.S., not just in one or two regions. "I think that being able to present the consumer's perspective, from various parts of the country, impressed both the franchisees and user associations. Since they knew that we had spoken to consumers in their areas I think they were able to more enthusiastically endorse the strategic direction that we were recommending," Bailey says.

### Branching out

Now well-established in the U.S., videoconferencing is branching out across the world. John Houlihan, president of FocusVision Network, reports that the company just completed its first international transmission of live focus groups. Once again, Ammirati Puris Lintas is on the leading edge. Bailey says that FocusVision was just installed in the agency's London office. She sees videoconferencing as a boon for global research.

"Especially on global projects, it's so important that we get a deep understanding of the local consumer and that we understand the meaning of brands and products. Cultures are different and brands have developed differently in various countries. Therefore we can only guess as to their image in Europe. Yet we can watch consumers talking about their image from our conference room. Within a few years when we have facilities in all of the major European cities and Latin America we're really going to be able to bring the worldwide perspective to the central strategy.

"We truly believe that research is so integral to developing an effective strategy. Clients aren't buying things on face value, they want proof. And even though we do several groups for a new business pitch, plus significant quantitative research, with the savings in air travel and hotels, the videoconferencing ends up paying for itself." □



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## Research Company News

continued from p. 21

search firm headquartered in Nicosia, Cyprus, with offices in 25 countries, joins 14 network partners in offering CSM Worldwide products in over 50 countries. CSM Worldwide products are used to measure and manage customer and employee satisfaction and loyalty. The CSM Worldwide brand, owned by Walker Information, Indianapolis, Ind., is licensed to research firms who are selected and assigned to exclusive geographic territories.

**ICT Group, Inc.**, Langhorne, Pa., has opened a new call center in Saint John, New Brunswick, Canada. The bilingual French/English outbound telemarketing facility will specialize in marketing to the financial services and insurance industries.

**Decisionmark Corp.**, Cedar Rapids, Ia., has signed a joint-information agreement with Donnelley Marketing, Inc. Under the terms of the agreement, Decisionmark will act as a reseller of Donnelley's DQ12 file and the ShareForce Lifestyle database, which provide information on approximately 90 million U.S. households and 150 million individuals. The information will be formatted for use with Decisionmark's desktop software package Proximity.

Two Cleveland research firms, **Decision Research Corp.** and **Tactical Decisions Group**, have merged to form the TRIAD Research Group.

**Consumer Opinion Services**, Seattle, has added focus group facilities to its office at Northtown Mall in Spokane, Wash. The new facility features a tapered conference table with seating for 10 to 12. The viewing room measures 15x12 feet and seats eight to 10 observers. Recruiting is handled on-site and supervised by office manager Ruth Rivers. For more information call Jerry Carter or Greg Carter at 206-241-6050.

**Total Research Corp.**, Princeton, N.J., and **EXL Group**, a quality management consultancy, have formed a strategic alliance to expand the scope of

Total Research's Customer Loyalty Management process.

**IBC USA Publications, Inc.**, East Syracuse, N.Y., has acquired the assets of W-Two Publications Ltd., Ithaca,

N.Y. W-Two publishes four titles on international demographics (Market: Europe, Market: Latin America, Market: Asia/Pacific and Market: Africa/Mid-East) and offers ancillary products and services.



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## Super Bowl

continued from p. 33

most accurate, complete and reliable measure of the number that noticed the commercial. It separates the people who noticed a commercial from those who ignored it, or were never exposed to it, so we can see if it had any effect on them. It shows if the communication process had a chance to start.

We also looked at a key measure of the information communicated by the commercials. How many remembered who they were for? Here the percent among recognizers ranged from 91 percent to 20 percent. The best at getting the name were usually the same that were best at getting noticed. But not always. Some commercials for jeans and credit cards did an excellent job getting noticed but not in getting the name across.

### Second: How many were affected by the commercials they noticed?

The previous measures only show if the commercial had a chance to affect people. To find out if it actually did, two types of measures were used — likabil-

ity and diagnostics — the two that were shown to be the best indicators of advertising effectiveness by the Advertising Research Foundation Copy Research Validity Study<sup>1</sup>. BRC has been using both since 1985. Likability was the best of all measures, and since it applies to all commercials it lends itself well to the ranking of commercials. However, if people like a commercial but can't remember who it was for, it can't have an effect on sales. So, we combine the two in our second basic measure of advertising's impact: the percent of recognizers that knew who it was for and liked it. The commercials that performed best in this second pair of measures were:

Pepsi: Cindy Crawford "Boys on Fence" (1992) .....	72 percent
Pepsi: Two drivers in a diner (1995) .....	69 percent
MasterLock: Burglars (1992) .....	69 percent
Budweiser: Frogs (1995) .....	68 percent
McDonald's: Michael Jordan/Larry Bird (1993) .....	68 percent

Here there was an even wider range in the performance scores. The bottom five ranged from only 2 percent knowing who it is for and liking it, to 12

percent. Those who say you only see the best of American advertising during the Super Bowl are way off the mark. More than a few giant companies who should know better are wasting millions on the Super Bowl.

### Third: What gives the most bang per buck?

How do these results compare with the number reached and affected by the average commercial aired on the networks during prime time? Here's where things get interesting. On an overall basis, 44 percent of the Super Bowl commercials reached and affected more people than the average prime-time network commercial, after allowing for differences in expenditures. So even

though the overall split is close to 50/50, prime network time is a slightly better buy. But the odds change dramatically when you separate Super Bowl com-

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mercials into those that were only aired on the Super Bowl and those that received a lot of additional airings. That turns out to be one of the main differences reflected in the two sets of top commercials listed previously. The first set with the top recognition scores all had a lot of additional exposure. The amount spent to air a commercial has its biggest effect on recognition. It accounts for much less of the variation found in the impact advertising has on those who notice it. (Two years ago the measurements we were taking could account for 63 percent of the variation in overall performance. Last year we got it up to 79 percent. We are working on additional measures now to see if we can get further improvements this year.)

When we broke out the commercials that only aired on the Super Bowl we found 65 percent reached and affected more people than would have been expected if a similar amount had been spent to air the commercial on the networks during prime time. This backs up the much-discussed findings of John Philip Jones<sup>2</sup> that advertising's effect is immediate, and it's the first exposure that has the big effect. Airing a commercial on the Super Bowl delivers the largest possible number of first-time exposures. Spending the same amount on any other combination of programs is almost certain to deliver a substantial number of people who are seeing the commercial for the second time or the third time, etc.

As expected, the Super Bowl proves most cost efficient in reaching men and sports fans. But it is also more efficient in reaching college graduates, professionals and executives, skilled blue-collar workers and those under 30 than it is in reaching their opposite counterparts.

To get the exposure data we had Nielsen's Monitor Plus tell us when each Super Bowl commercial was aired on other programs during the survey period and how much was spent to air it. Comparisons of performance scores were made with BRC norms for prime-time network commercials that have been the subject of seven articles in the trade journals during the past 15 years<sup>3</sup>.

#### Fourth: What approaches worked best?

Knowing which was most effective is one thing. Understanding why is another. That's where BRC's diagnostic measures provide some an-

swers. Their use is illustrated in the comparative performance chart for the average food and beverage commercial on the Super Bowl. It is the category that performs the best on the Super Bowl and the chart shows why.

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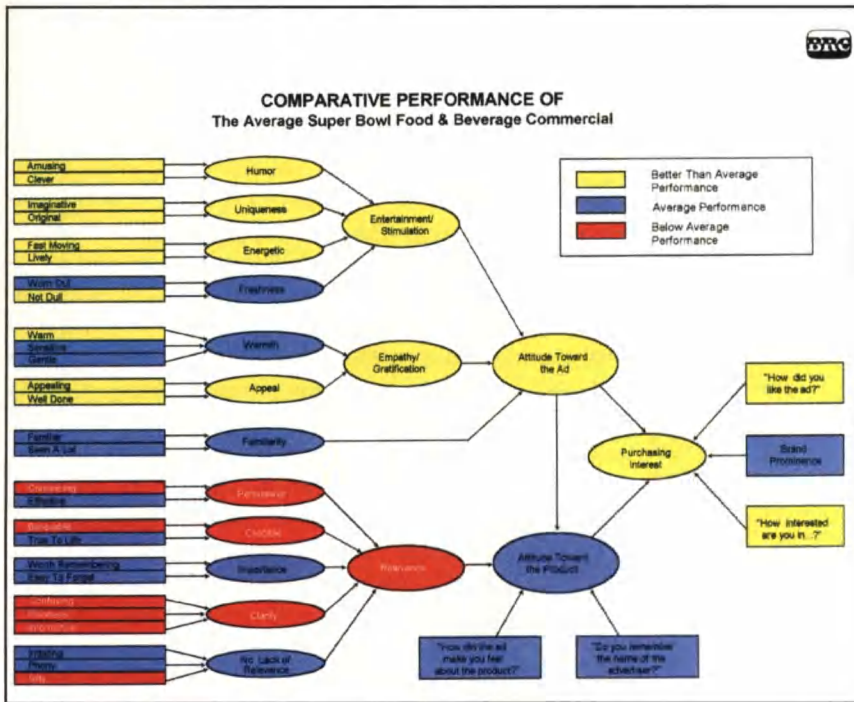
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The mood was far more important than the message, particularly the humor, uniqueness and the pace.

time network commercial. Yet these were very successful commercials, as shown by the above-average im-

ses have found to be most important in producing effective Super Bowl commercials, along with specific examples of executions that have worked in each area and executions that didn't work.



Their messages were not seen as being nearly as persuasive, credible or clear as in the average prime-

time network commercial. The above-average performance scores on the top half of the chart show these to be successful examples of

Haley & Baldinger, (1991) "The ARF Copy Research Validity Project," Journal of Advertising Research, 4-5/91.

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Aaker & Bruzzone (1985), "Causes of Irritation In Television Advertising," Journal of Marketing, 49, 47-57.

Aaker & Norris (1982), "Characteristics

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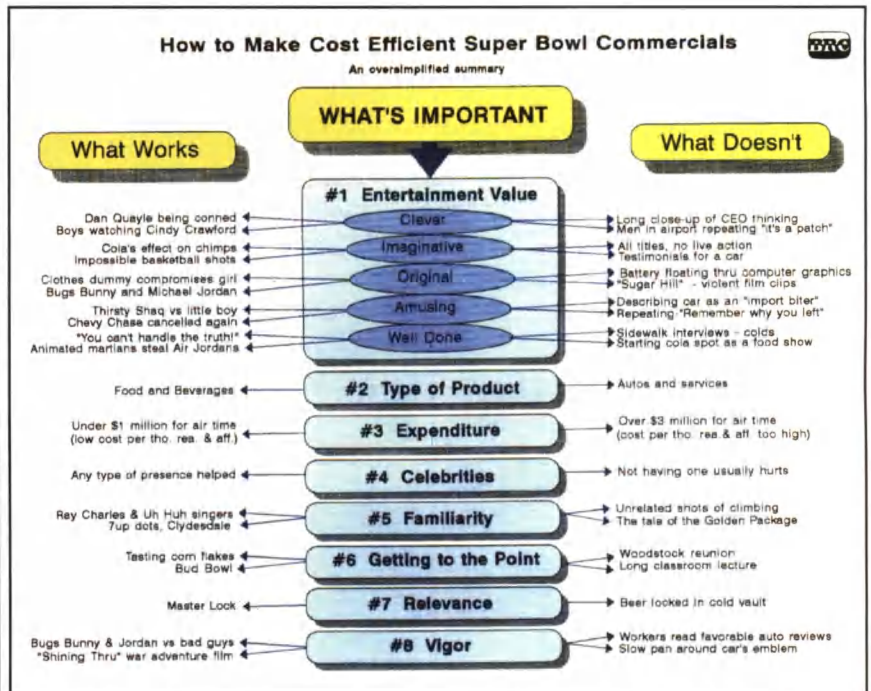
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using the peripheral route to persuasion and behavior modification.

The last chart is an attempt to pull together everything we're learning from these studies. It shows the things our multivariate analy-

of TV Commercials Perceived as Informative," Journal of Advertising Research, 4/82.

Aaker & Bruzzone (1981), "Viewer Perceptions of Prime Time Television Advertising," Journal of Advertising Research, 10/81. □

## Names of Note

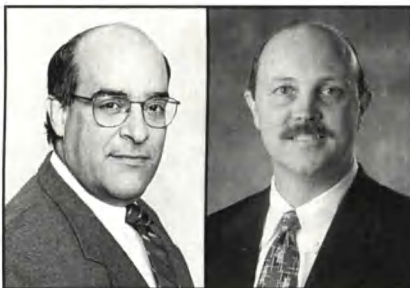
continued from p. 20

sales associate, ICT Response. **Mark S. McConkey** has been named director of sales, ICT Response. **John (Jack) Magee** has been named president of ICT TeleServices.

**Scott L. Martin** has joined the staff of *Erich Transcultural Consultants*, Woodland Hills, Calif., as director of client services.

**Rudolph (Doss) Struse** has been appointed as Chairman/CEO of the USA operations of *Research International*, New York.

**George Dichiaro** has been named marketing research specialist and consultant with *Saul Cohen & Associates*, a Stamford, Conn., research firm.



Dichiaro

Toole

*Burke Customer Satisfaction Associates*, Cincinnati, has added **Joe Toole** to its staff as senior consultant.

**Christopher Sellers** has been appointed to the new position of executive vice president, director of retail services, at the recently-formed Canadian operation of Chicago-based *Information Resources, Inc.*

**Tina Fromme Shemetulskis** has been appointed new business coordinator for *Aragon Consulting Group*, St. Louis. **Barbara Hohbach** has been named the firm's public relations manager.

**Noah Pines** has joined *Ruder•Finn*, a New York public relations firm, as director, research & forecasts.

**Rea Kolski** has been promoted to president and COO of *TAI-Chicago* and both locations of *TAI-New Jer-*

*sey*. The research firms' former president, **Hal Meier**, assumes the position of chairman and will concentrate on expansion and new services.

**Matt Forbush** has been promoted to

assistant supervisor of the phone room at *Barnes Research, Inc.*, Grand Rapids, Mich.

**Ian Lewis** has joined *Time Inc.* as director of market research.

# etc



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## Research roundtable

continued from p. 35

Gershowitz: "When computerized interviewing took hold in 1982, we were doing studies with clients where I would have a disclaimer that this

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was a new methodology and results may very well be different. They probably were better, but clients had to understand that you couldn't do a tracking study by changing methodologies in midstream. I think we're going to be seeing some of that with the new technologies. If it's understood up front, I think our clients will benefit from it."

### How has the reengineering/downsizing of corporate America affected research professionals and budgets?

Foster: "In several instances the collective research knowledge has been lost. You start to see entire research organizations blown away or entirely revamped and we, as the research provider, are asked to recreate the entire collective knowledge. A lot of the responsibility has been put on very junior people, people who may not be ready for it, and that gets back to training."

Gordon: "More frightening than reengineering is the decentralization of research departments. It no longer enables the collective wis-

## Reengineering research: Making it the best of times

By Valerie M. Crane

*Editor's Note: Valerie M. Crane is a partner in The Capstone Group, a marketing research and communications consulting firm in San Diego.*

"It was the best of times and it was the worst of times." While Dickens was describing a France ripe for revolution, Dr. Wayne McCullough, program director, communications measurement & research for IBM, was referring to the marketing research environment of the last 10 years. McCullough made his remarks to the AMA's Attitude/Behavioral Research Conference in late January in La Jolla, Calif.

"We've experienced, whether you recognize it or not, fundamental change in the research industry," said McCullough to an audience of more than 200 marketing research professionals. "Since the mid-'80s, America's large and even small firms have been caught in this constant downward spiral of downsizing, or, to use the politically correct term, 'right-sizing.' As a result, large numbers of management and staff have been furloughed and oftentimes these reductions were just x-percent across the board.

"Our own experience within IBM is that in 1987 we had hundreds of researchers spread throughout the country. The overall population [at IBM] was about 408,000. By the year 1994, that number had been reduced to 216,000 and the research function had been reduced to about one-fourth of what it had been."

Many marketing staffs have now taken over the responsibility of planning, executing and reporting research activities. Other companies are depending heavily on suppliers or inside consultants. While practitioners in the field may be alarmed by this, they should instead view it as a genuine opportunity to initiate real change in how research is done, said McCullough.

"We're all well-acquainted with the MBF syndrome — more, better, faster — and we may not like it, but therein lies an opportunity to reengineer our activities to meet or exceed those expectations."

So how can the marketing research function position itself to cope with the scenario of MBF? "In the past, research was more reactive. We did tracking

continued on p. 60



dom to be there for researchers to be trained in a central environment. Great research comes out when researchers begin to exchange ideas."

Naples: "Reengineering has really meant disinvestment in research. Advertising agencies virtually do not have marketing research departments any longer. The fee structure change in the ad business means that agencies are no longer compensated the way they were in the past. Therefore they're no longer investing in research the way they did in the past. They don't get credit for it, so why do it? Reengineering has basically begun to weaken the profession. I think the counterbalance is in what the research companies are doing and so my hope is with them."

Gershowitz: "From the data collection perspective, I know my clients are under more pressure in the course of reengineering. I think that part of their responsibility is to sit there and hold their client's hand through the process. The trickle-down effect is that the pressure for us to get projects through in a timely fashion is that much greater. I rarely see a document that is in its final format. I see three or four final documents. I'd like to have a dollar for every document that it suppose to be a final one."

Gordon: "The whole sensitivity is head count. You begin to wonder why a company lets go of a researcher who was making \$50,000 and whatever the cost of their overhead was and then hires them back later as a consultant for 50 percent of their time and pays them \$70,000. You begin to wonder if the economics of this add up. The sensitivity to head count seems to take precedence over what actually hits the bottom line. There are a lot of corporate clients now that are basically renting [researchers] from a supplier."

Bowers: "Again, that's an opportunity. It may be sad for those people who are on the cutting side, but

they also should look at it as an opportunity. They can say, 'If I'm really a professional I have something to offer and sell back. I can offer that service to a corporation who doesn't want to have it internally.'"

Naples: "It doesn't really matter what the structure is [of the marketing research department]. What really matters is that the information

is suitable to the corporation. What we've been finding is that reengineering and downsizing has been working to undermine the suitability and validity of research to the corporation as far as its institutional memory. We're in a transition period as to the way American companies do business. Research can't stay the same in that. What the industry needs to do is come up

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with the proper footing for research. This may come through technology or training or reinvestment by companies themselves realizing they're undermining their information value. We really need to stay on top of what the needs are and try to keep influencing them, and I think we are."

Gershowitz: "I'm curious to see how America is going to view research after 1995 with the market being at historical highs, with cor-

porate profits being way up there. Is it going to be perceived that research was of value to attaining those numbers?"

**With corporate emphasis on short-term gains, are companies taking the time to do long-range planning and research?**

Gordon: "From my vantage point, I started seeing from about 1989 to 1993 an incredibly short-term view, more short-term than I had ever

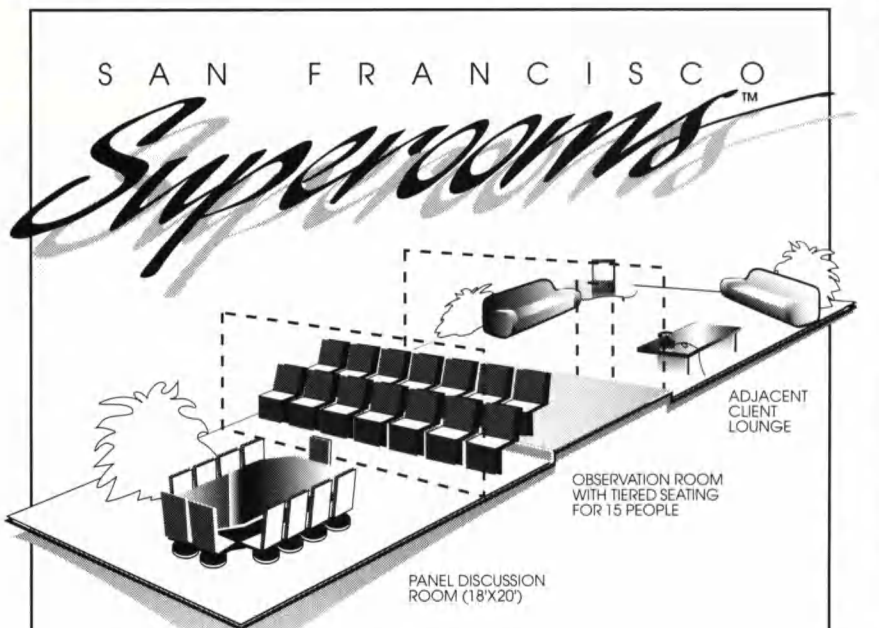
seen. To me what was taking place in that four to five year stretch was what I call band-aid research. Everyone was out for the quick fix. The general rule was that if they couldn't respond to this research and turn it into something profitable within 90 days they didn't do it. Starting around mid-'94, I've seen more of a return to strategic research. The idealistic side of me says that companies have realized their shortcomings and the importance of going out for research, while the practical and cynical side of me suggests that some have become so far removed from the market that, out of absolute necessity, they're going back out. They realize the decisions they are making are truly being done in a vacuum."

**Would you advise a college student to major in marketing research?**

Naples: "It's an information business and information is the revolution we're in, so why wouldn't research be a good career path? I think it can only grow in stature as time goes by. I think the fact that the research companies are coming on strong now means they will value their product more and more as they gain strength. They'll invest in their product so it'll be a better career path."

Gordon: "I would recommend with the caution that they not become a research technician. If you're going to go into research, have a good, broad, thorough understanding of marketing. There are too many people out there today who think that marketing research is totally separate from marketing. It astounds me the number of times I hear 'I have nothing to do with that — it's a marketing issue.' There's been too much of a barrier between marketing and marketing research."

Bowers: "I think we ought take that one step further. It's not just the interface between research and marketing, but also that creative side that gives us the uniqueness —



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what they call the 'value added.' I'm afraid a lot of times researchers hold back on that because they feel the client doesn't want to hear it, that it's not applicable. But it really is."

Foster: "I think a lot of people may stumble into research. That's exactly how I did it. I think the most valuable part was having a liberal arts, broad, business degree. I think you're more successful once you get to a certain level, basically beyond the beginning analyst. If there is an option to get a heavy dose of quantitative, absolutely do it, but I'm not convinced it's the only thing that makes a difference."

Bowers: "The people in this industry are really smart. When you think about the people you've come across in a lot of other industries and you can include professions like doctors, lawyers and dentists, I think those people often have blinders on. Researchers have a much broader view. They're wonderful thinkers." □

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## Reengineering research

continued from p. 56

studies and profiled the marketplace. We were basically order takers. If you want to simply be an order taker today, your function will disappear."

If being reactive will force researchers along the path of the dinosaur, what does it mean to be proactive? The key word is anticipation. "We need to be able to anticipate market-

place questions — questions that our organizations have not yet asked. The transformation of the function is really going to be one of being a provider of synthesized information, knowledge and customer insights. The knowledge piece is different than just data. Where we'll end up is being a repository of customer insights."

Besides a functional transformation, Dr. McCullough argued an organizational transformation is needed

as well. In the past, many research organizations were rigid and compartmentalized, often removed both physically and psychologically from their clients.

"What we're going to need to do in terms of organizational structure is facilitate the transformation of data to organization knowledge. We need to be closer to our clients. Oftentimes, requirements come out of hallway conversations. If we're not sitting in those meetings where someone isn't satisfied with sales data, we won't be able to anticipate those requirements. So we need to be physically and psychologically integrated with our clients."

Functional and organizational transformation are two of the three legs of the reengineered research footstool. The third is skill transformation. While researchers in the past could be specialists with narrow skill sets and very specific experience within a category or industry, the new researcher needs to be what Dr. McCullough described as a "broadened specialist."

"You don't need to have everyone understanding and executing everything in research, but you're going to have to understand and execute the broader range of research activities. We need to expand skills of design, data collection, analysis and consulting. The more effective market research functions are those that have been very successful in understanding requirements. The best piece of research is often that which is not executed. You often get requirements that aren't going to make a difference at the end of the day. So consultancy skills are more important than ever."

This new broadened specialist also needs one additional item in his toolbox: international and cultural literacy. The four fastest growing world markets are Brazil, China, India and Mexico. As McCullough noted, "You cannot just go into these markets and do research like you have in the United States. There are cultural issues and it takes a very different skill set."

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dustry — to make it the “best” of times — will require cutting-edge methods, faster analytic techniques, a new integrated organizational structure and broadly based specialists who can transform a plethora of information into meaningful customer insights.

But can this transformation take place? Are the right people available now to make it happen? Will they be in the future? The evidence is not necessarily encouraging.

A recent report by Career Consulting Group Inc. of Stamford, Conn., found few opportunities on the corporate side for entry-level positions. There seems to be almost a universal failure of corporations to invest in training new college graduates. A panel of speakers was convened at the AMA conference to follow Dr. McCullough and address these critical training issues.

The opening comment by Rod Bell, director of business insights, Coors Brewing Company, was one that was echoed by many conference participants. “At Coors, we do very little formal training in marketing research. We have looked to our suppliers and consultants to do actual training on research techniques.”

Not surprisingly, Michael Redington, president of M/A/R/C and on the supplier side of the business, noted, “In the last decade or so, we’ve come to realize that training is the most important thing we do besides make money. The first thing we do is teach our account services people the nuts and bolts of the business.”

In the past, companies made significant investments in training entry level analysts. As Redington remembered, “Out of graduate school, I went into the executive training program [at Burke] for a full year — it was six months on the telephone, door-to-door for a summer in New Orleans, learning how to tabulate data, understanding the basic science of the business. Today I don’t think we can take a year to do that.”

Michael Lotti, director of marketing research, Consumer Imaging,

Eastman Kodak Company, found mentoring to be a critical part of his early career development. “Perhaps my most important experience was not training, but development — the opportunity to work with a senior analyst in a partnership, watch how they work, understand the questions they were asking. We were invited very early to business meetings, to sit at the table, not necessarily as full participants, but as observers, and

that helped us formulate the questions we asked.”

Lotti argued that a valuable component is being lost by the industry’s changing attitude toward entry level training. “People aren’t taught the soft side of the business anymore — the consulting role.” Yet, this consulting role is exactly what Dr. McCullough and others agree is necessary to reengineer the research industry. Larry Gibson of Eric Marder



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Associates, Inc. and a conference participant, summarized the importance and the challenge of the consulting role. "The essence of the corporate researcher's job doesn't have to do with conjoint analysis, discriminant analysis or modeling, let alone questionnaire design or working, sampling issues or anything like that. The essence of the job has to do with problem definition. When projects fail, it's not because the interviews didn't get done or something like that, but because the problem wasn't well formulated. How do you go about training somebody in problem definition?"

The emphasis today is on strategic thinking. The panelists generally acknowledged that it's difficult to train someone to be a strategic thinker. It's more a matter of selecting someone who already has this fundamental competency. But where to look and what questions to ask?

As moderator, Tim Key, director of

market research, Ross Products Division-Abbott Laboratories noted, "Earlier in my career I went on an interview for a director of marketing research position. The person doing the interviewing was assessing strategic thinking by asking hypothetical business questions and seeing whether I, as a marketing research professional, answered those with tools and techniques or whether I brought to bear a bigger picture. In other words, how broad was the landscape of my answer?"

If consulting, problem definition and strategic thinking are the three components necessary to reengineer the human side of the research equa-

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*"The essence of the corporate researcher's job doesn't have to do with conjoint analysis, discriminant analysis or modeling, let alone questionnaire design or working, sampling issues or anything like that. The essence of the job has to do with problem definition. When projects fail, it's not because the interviews didn't get done or something like that, but because the problem wasn't well formulated. How do you go about training somebody in problem definition?"*

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tion, the questions are many and the answers few. As Coors' Rod Bell observed, "The most important piece of training is how to teach someone how to sell, because they're selling themselves and they're selling their strategic thought. To me, that is the biggest challenge we have as an industry." □

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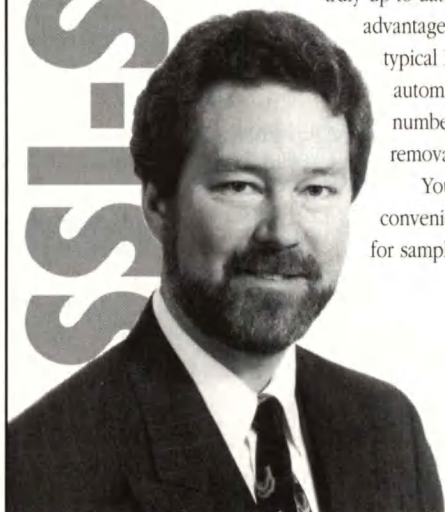
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## Product & Service Update — In-Depth

continued from p. 40

how beautiful a basket of fresh strawberries looked in the summer. They also thought that strawberries would be a stronger package than the current packaging. So, instantaneously, the computer projection product showed them the product packaged with strawberries. Consumers looked at the new strawberry package and decided that this was the perfect package and should be the new packaging.

watched while their consumers changed their product's packaging before their eyes.

In the first couple of focus groups, consumers talked about the packaging very generally and helped them discover what worked with the current package and what could be improved. Keeping this in mind, consumers were shown some of the new packaging that had been developed by the creative team through the computer projection product. They were asked to react to the new packaging and to improve it.

At first, consumers made very simple changes. But then they started talking about how fragile the packaging is, and wouldn't it be wonderful to have a package that was not so fragile. Someone came up with the idea of bricks, and instantaneously, the computer projection product showed them the product made of bricks. Consumers looked at the new packaging and decided the brick package could be the new packaging.

Armed with the computer projection product and their previous learning, off they went to the next city and the next set of groups. These groups went through a similar process. However, during these groups, respondents were shown the new brick packaging and were asked to react to it and to improve it.

The new respondents liked the idea of fortifying the packaging but decided that they also wanted to increase its aesthetic appeal. During the discussion, someone remembered

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options to quantitative package testing for validation. After listening and looking at consumer input, it



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course, the new packaging made lots of sense. Apparently, strawberries are all the rage this year!

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## Trade Talk

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writes, "if I didn't admit that, over the years, a few of our clients have asked us to test what teens rightly call 'crap.' Evidently, some marketers think that if they package their products in hot teen colors, use a popular celebrity, or shoot an MTV-style commercial, teens will buy. They are mistaken."

Of course, my favorite chapter is the one on how to research teens. In about 30 pages Zollo neatly covers what he calls the "perils and pitfalls" of teen research, summarizing the various approaches to talking to teens and what you can expect to learn from them.

### Billions and billions

In 1994, TRU estimates teens spent \$63 billion of their own money and \$36 billion of family money. These amounts alone are staggering, and they don't even include the additional billions of dollars of family spending that is *influenced* by teenagers.

According to TRU's findings, teens have an average weekly income of \$67. They spend on average \$39 of their own money each week and \$27 of family money. About two-thirds have savings accounts. Almost one-third of 18-19 year-olds have a credit card in their name. Nearly 20 percent of teens have checking accounts.

"Today's teens have the means to move brand sales in a big way," Zollo writes. "Although most adults earn more money than teens, a larger share of teen income is discretionary. Teens aren't saddled with mortgage or utility bills. They can spend their funds freely. This fact, coupled with their rising incomes, makes teens an attractive consumer segment. If you sell traditional teen products, you already know this. Marketers of adult brands are just beginning to realize it."

### Not immune to ads

Teens may be quick to disdain a company that throws a lame, calculated ad at them, but they aren't immune to the powers of advertising. As Zollo reports, their favorite television commercials correlate to their favorite brands. When asked about their favorite ads, teens typically mention those from the brands that sit atop the list of cool brands — Nike, Levi's, Sega, Coke, Pepsi, Reebok and Nintendo.

The book shows that while marketers shouldn't overestimate the value of appearing "hip" to kids, nor should they underestimate teens' judgement when it comes to choosing products. Just because they're young doesn't mean they use trivial or unrealistic criteria to choose the products they buy. Of course, it helps if all of their friends use it, but when TRU researchers have asked teens what makes a brand cool, 66 percent have said that "quality" is the characteristic that's most important.

Many marketers are realizing the importance of forging a bond with younger consumers but they worry about teens' fickleness. How brand loyal are teens? In the chapter "Teens, Products and Brands" Zollo elaborates on TRU's efforts to use research to more fully understand the relationship between brand loyalty and brand choice. Particularly interesting is a section where

he analyzes a quadrant map illustrating the interaction of brand loyalty and brand importance.

### Worth the effort

At the end of the book, Zollo offers the marketer who is interested in reaching teens some ammunition for their battle to convince corporate management why it's worth the effort to get to know this challenging and lucrative

---

***"We often tell gun-shy potential teen marketers that trying to understand teens need not be so trying. Teens are not so enigmatic, so difficult to understand, and so fickle in their likes and dislikes that they cannot be swayed by well-crafted advertising and marketing efforts."***

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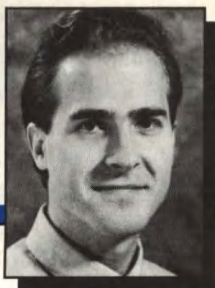
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"We often tell gun-shy potential teen marketers that trying to understand teens need not be so trying. Teens are not so enigmatic, so difficult to understand, and so fickle in their likes and dislikes that they cannot be swayed by well-crafted advertising and marketing efforts.

"In the past five to 10 years, the collective knowledge about teens and an understanding of how to reach them has grown enormously, allowing more companies to create relevant and compelling marketing communications directed at teens. In fact, many of today's most successful brands are thriving in large part because of their teen efforts.

"Go ahead, make the case to management. Tell them why and how the teen market can grow your business. By marketing to teens smartly and creatively, the reward will be well worth the risk." □

*"Wise Up To Teens: Insights Into Marketing and Advertising to Teenagers" (\$34.95, cloth, 311 pages) by Peter Zollo, is published by New Strategist Publications, P.O. Box 242, Ithaca, N.Y., 14851. Phone 607-273-0913.*



## Trade Talk

By Joseph Rydholm/QMRR editor

# The inside scoop on targeting teens

**O**f all the marketing jobs out there, I've always imagined that marketing to teenagers has to be one of the most difficult. Teenagers can be brutal, merciless critics, ready to trash any company that they feel is trying to be "cool" and "speak their language" by peppering their ads with the latest slang. And they're notoriously fickle consumers, seemingly changing their tastes as often as their moods.

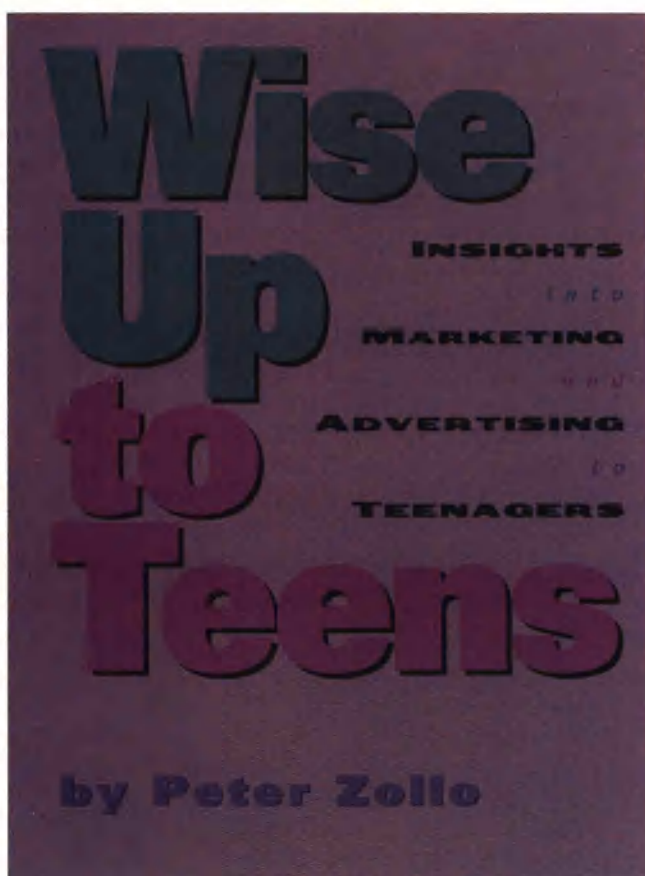
But they're a market you can't ignore. Not only do they spend huge amounts of money themselves, they also have a say in how their parents, friends and siblings spend their money. And, for many product categories, they can be a valuable source of lifelong customers. Earn a teenage consumer's trust and loyalty and they may be yours for life.

If your company markets to teens, or better yet, if you're thinking about it, you'll want to check out Peter Zollo's book. Zollo, president of Teenage Research Unlimited (TRU), Northbrook, Ill., has writ-

ten "Wise Up To Teens," a quick-reading 300 pages of insights gleaned from years of talking to and listening to teenagers and from TRU's syndicated Teenage Marketing & Lifestyle Study. The company has conducted the semiannual study for more than 12 years, asking a nationally representative sample of more than 2,000 12-to-19-year-olds about everything from soda pop to social concerns.

If you have questions about the teen market, this book likely holds the answers. Zollo covers every aspect of marketing to teens, including teens and the media, their activities and interests, how to choose the right celebrity endorser and how to reach them with advertising.

The book is a fun read. Zollo doesn't crusade for the teen market with windy proclamations. Rather, he gives the reader plenty of substance, with clarity and wit. An example: "I would be less than candid," he



continued on p. 73

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**EXPERTISE.** You learn from the experts who "wrote the book" on marketing research training and have educated more practitioners than anyone else in the world.

**BREADTH.** You get to select from a wide range of programs designed to meet your continuing educational needs. Our programmed sequence of seminars eliminates the duplication and conflicting content which often results from attending disjointed seminars from different sources.

**RECOGNITION.** You get tangible professional recognition for attendance through our highly respected certificates of achievement.

**REALISM.** Our seminars combine academic rigor with real-life expertise gained from having done tens of thousands of research studies. The content is usable immediately in day-to-day work.

These are just some of the many reasons for the superlative evaluations we receive from our participants:

Excellent - highly recommended and of immediate practical value upon return to work, excellent balance of examples and background/explanatory info. Speaker the best - incredibly lively, interesting, helpful, dynamic, genuine and thoroughly knowledgeable about the subject - as well as relating the info presented to audience needs.

Marketing Analyst, **Merck Sharp & Dohme**

Excellent - Learned extraordinary amount in 2 days. Excellent content, excellent workbook. Will refer to manual often in the future.

Marketing Research Manager, **U.S. West**

Fantastic - the best seminar on any subject I've been to. Right on target — will be a help immediately. Speaker superb. A born teacher.

Marketing Research Analyst, **Ford Motor Company**

## The Burke Institute

### Partial Schedule of Seminars Through December 1996

<b>101. Practical Marketing Research</b>	San Francisco ..... Jan. 8-10 Chicago ..... Jan. 29-31 Cincinnati ..... Feb. 19-21 Baltimore ..... Mar. 18-20 New York ..... Apr. 22-24 New Orleans ..... May 13-15 Boston ..... June 3-5 Cincinnati ..... June 24-26 Chicago ..... July 15-17 Cincinnati ..... Aug. 5-7 New York ..... Sept. 9-11 Chicago ..... Oct. 7-9 San Diego ..... Oct. 28-30 Atlanta ..... Dec. 2-4	<b>401. Managing Marketing Research</b>	Cincinnati ..... Mar. 14-15 Boston ..... June 6-7 Cincinnati ..... Aug. 29-30 San Diego ..... Oct. 31-Nov. 1
<b>102. Introduction to Marketing Research</b>	Cincinnati ..... May 7-8	<b>501. Applications of Marketing Research</b>	Cincinnati ..... Feb. 22-23 New York ..... Apr. 25-26 Cincinnati ..... June 27-28 Cincinnati ..... Aug. 8-9 Chicago ..... Oct. 10-11 Atlanta ..... Dec. 5-6
<b>103. Marketing Research for Decision Makers</b>	Baltimore ..... June 25-26	<b>502. Product Research</b>	Cincinnati ..... Jan. 11-12 New York ..... Apr. 11-12 Chicago ..... July 18-19 Cincinnati ..... Oct. 15-16
<b>104. Questionnaire Construction Workshop</b>	San Antonio ..... Jan. 15-17 Cincinnati ..... Feb. 26-28 New York ..... Apr. 15-17 Chicago ..... June 10-12 Cincinnati ..... Aug. 12-14 Boston ..... Sept. 23-25 Toronto ..... Nov. 12-14 San Francisco ..... Dec. 16-18	<b>504. Advertising Research</b>	Baltimore ..... Feb. 15-16 Cincinnati ..... May 23-24 New York ..... Aug. 1-2 Cincinnati ..... Oct. 24-25
<b>105. Questionnaire Design</b>	San Antonio ..... Jan. 18-19 Cincinnati ..... Feb. 29-Mar. 1 New York ..... April 18-19 Chicago ..... June 13-14 Cincinnati ..... Aug. 15-16 Boston ..... Sept. 26-27 San Francisco ..... Dec. 19-20	<b>505. Market Segmentation Research</b>	Baltimore ..... Feb. 13-14 Cincinnati ..... May 21-22 New York ..... July 30-31 Cincinnati ..... Oct. 22-23
<b>201. Focus Groups</b>	Chicago ..... Feb. 1-2 Boston ..... Oct. 1-2	<b>506. Customer Satisfaction Research</b>	San Francisco ..... Jan. 11-12 Cincinnati ..... May 9-10 New York ..... Sept. 5-6 Cincinnati ..... Nov. 25-26
<b>202. Focus Group Moderator Training</b>	Cincinnati ..... Jan. 30-Feb. 2 Cincinnati ..... Mar. 12-15 Cincinnati ..... Apr. 9-12 Cincinnati ..... May 21-24 Cincinnati ..... July 9-12 Cincinnati ..... Aug. 20-23 Cincinnati ..... Sept. 17-20 Cincinnati ..... Oct. 13-18 Cincinnati ..... Nov. 19-22	<b>509. Using Geodemographics for Marketing Decision Making</b>	New Orleans ..... June 6-7
<b>203. Focus Group Applications</b>	Cincinnati ..... Apr. 15-17 Cincinnati ..... Oct. 21-23	<b>601. Translating Data into Actionable Information: An Introduction</b>	New York ..... Jan. 25-26 Baltimore ..... Mar. 21-22 Toronto ..... May 2-3 New York ..... July 25-26 Chicago ..... Sept. 12-13 Cincinnati ..... Nov. 7-8
<b>204. Qualitative Research Reports</b>	Cincinnati ..... Apr. 18-19 Cincinnati ..... Oct. 24-25	<b>602. Tools and Techniques of Data Analysis</b>	New York ..... Jan. 30-Feb. 2 Cincinnati ..... Mar. 5-8 Toronto ..... May 7-10 Detroit ..... June 25-28 Cincinnati ..... Aug. 20-23 Baltimore ..... Oct. 1-4 Cincinnati ..... Nov. 12-15 San Francisco ..... Dec. 10-13
<b>301. Communicating Marketing Research</b>	New York ..... Jan. 22-24 Cincinnati ..... Mar. 11-13 Toronto ..... Apr. 29-May 1 Detroit ..... June 17-19 New York ..... July 22-24 Cincinnati ..... Aug. 26-28 Chicago ..... Oct. 2-4 Cincinnati ..... Nov. 4-6	<b>603. Practical Multivariate Analysis</b>	New York ..... Feb. 6-9 Cincinnati ..... Apr. 1-4 Chicago ..... May 14-17 San Francisco ..... July 23-26 New York ..... Oct. 8-11 Cincinnati ..... Nov. 19-22
		<b>701. International Marketing Research</b>	New York ..... May 29-30 Cincinnati ..... Sept. 17-18
		<b>702. Business to Business Marketing Research</b>	New York ..... July 1-3

CERTIFICATE OF ACHIEVEMENT IN MARKETING RESEARCH METHODOLOGY & APPLICATIONS

Cincinnati ..... Feb. 19-Mar. 15      Cincinnati ..... Aug. 5-30

CERTIFICATE OF PROFICIENCY IN QUALITATIVE RESEARCH

Cincinnati ..... Apr. 9-19      Cincinnati ..... Oct. 15-25

CERTIFICATE OF PROFICIENCY IN QUANTITATIVE ANALYSIS

New York ..... Jan. 22-Feb. 9      Cincinnati ..... Nov. 4-22

Toronto/Chicago ..... Apr. 29-May-17

Please call for additional information on these and other Burke Institute seminars.

All the above Burke Institute Seminars are available for in-house presentation.

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