

Quirk's

March 1997

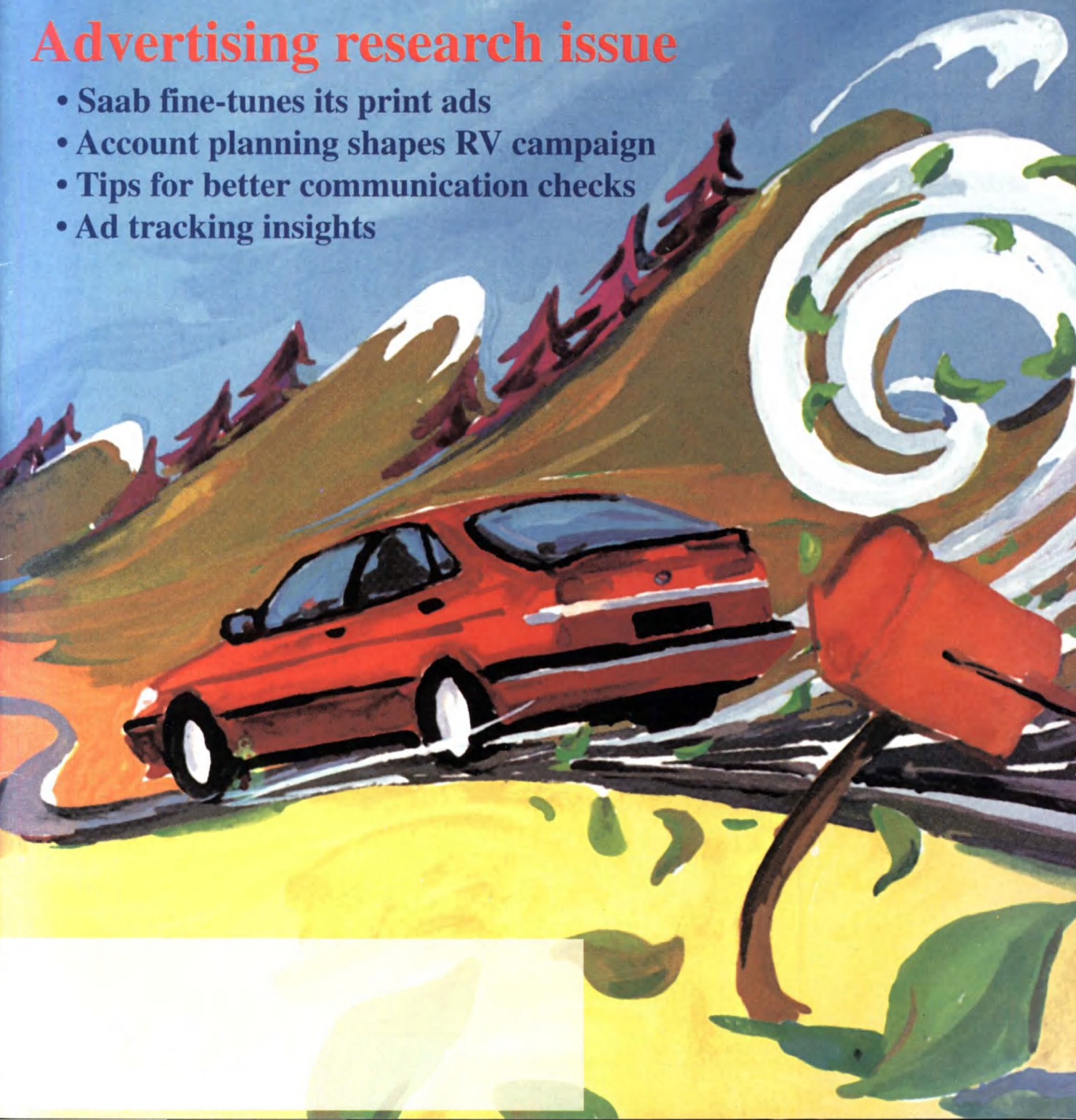
MARKETING RESEARCH

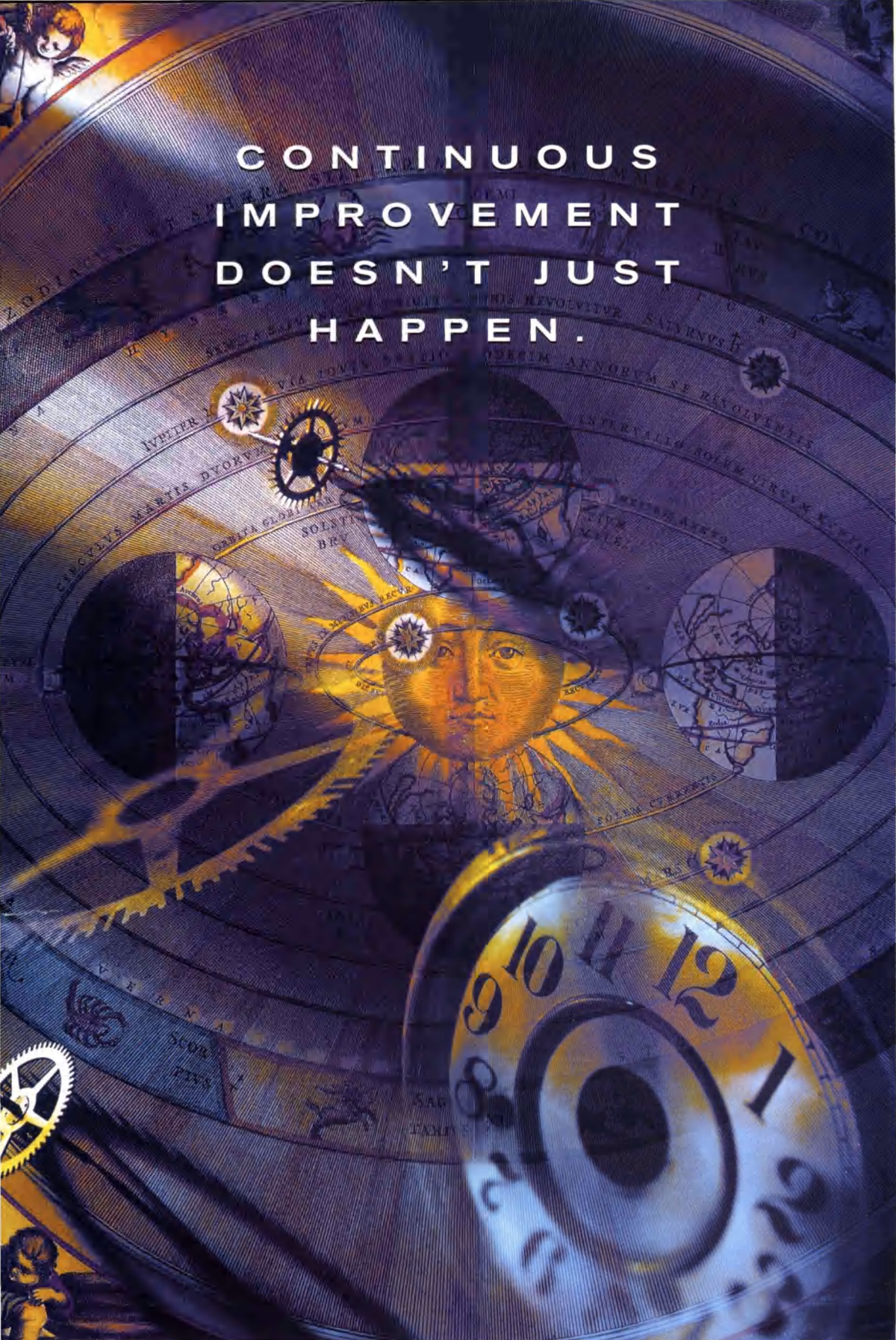
Practical applications in marketing research

Review

Advertising research issue

- Saab fine-tunes its print ads
- Account planning shapes RV campaign
- Tips for better communication checks
- Ad tracking insights





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Cincinnati
- July 14-16, 1997
San Francisco
- September 8-10, 1997
Chicago
- October 27-29, 1997
New York
- December 8-10, 1997
Cincinnati

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- June 2-4, 1997
Cincinnati
- October 13-15, 1997
New York

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- November 10-12, 1997
Chicago

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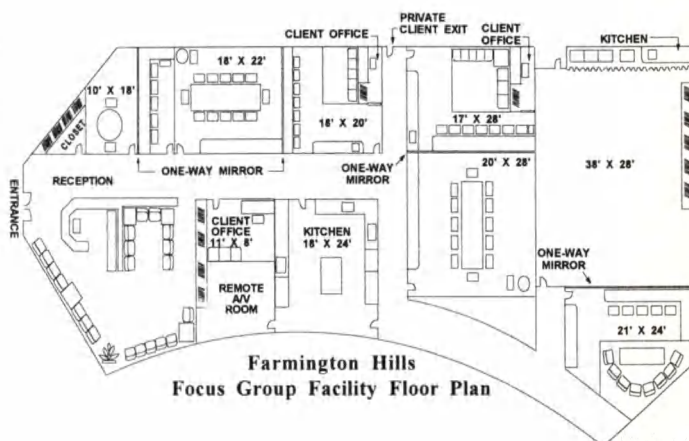
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Execs predict growth in Internet's research role

Executives in major American corporations foresee the Internet becoming an increasingly viable tool for conducting marketing and opinion research.



According to a survey by the Council of American Survey Research Organizations (CASRO), Port Jefferson, N.Y., half or more of

the executives and middle managers who responded believe that "in the future" Internet surveys will "be as reliable and accurate as those done by mail, telephone or in person."

However, half or fewer of those surveyed believe Internet surveys are currently as accurate and reliable as surveys conducted by more traditional methods.

"Given the fact that conducting surveys over the Internet presents a new range of methodological and business concerns that could have a profound impact on the survey research industry, CASRO felt it was time to conduct its own survey among middle managers and executives at large U.S. companies to gauge how they think about and whether or not they use Internet sur-

veys," says James Fouss, CASRO's board chairman and president of Response Analysis Corp., Princeton, N.J.

"As the Internet's explosive growth continues, American industry is increasingly coming to rely on the Internet's ever-expanding range of information and business services," says Nick

Tortorello, who directed the Internet survey project and is a senior vice president of Roper Starch Worldwide, Inc.

"Business has been quick to pick up on one way the Internet can help them gather critical information at a relatively low cost — survey research via

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Are Americans wearing rose-colored glasses?

In the survey, "Quality of Life," conducted by CDB Research & Consulting Inc., New York, two out of three adult Americans claim they are better-off now than they were five years ago despite some alarming facts. The rates of murder, rape and assault nationwide, compared to rates of years past, are increasing. In the case of rape, rates have doubled and have tripled in the case of assault. Women are still earning only about half of what men earn, despite the fact that more women are completing college than men. Hispanics are still typically earning \$10,607 per year less than whites earn.



Despite the number of people claiming to be better off now, 46 percent of college-educated Americans and 39 percent of non-college-educated Americans do not believe that their children will enjoy a higher standard of living than did their generation.

The survey concluded that this dichotomy is affecting consumer purchasing decisions in an interesting way. "What was surprising, in the numbers we found, was the disparity between fact and people's perception of fact," says Jean Farinelli, chairman and chief executive officer of Creamer Dickson Basford. "This perception gap is what has been influencing American consumer behavior."

According to the CDB study, there are many positive indicators. Over past decades the state of the environment, American life expectancy and the GDP have all shown gains over figures collected since 1968. But despite these trends, consumer confidence is down. Americans are feeling anxious about their place in the economy, purchasing items with value that will last. Occasionally they will treat themselves to mini-luxuries, such as high-priced chocolates, clothing or dinners at a restaurant, which provide temporary gratification and comfort. Though more Americans reported feeling "pretty happy" more now than in earlier years, the percent of "very happy" Americans has been dropping since 1972.

"People's perceptions about their quality of life do not necessarily follow what many broad indicators seem to say about life quality improvements," says Larry Chiagouris, managing director of CDB Research & Consulting. "Perception seems to have lagged behind reality."

The survey, conducted by telephone with 400 people, is a part of a larger CDB report which analyzes changes in quality of life over the past 25 years. The report analyzes 25-year trends in the environment, health, crime, education, the economy, equality in the workplace and life satisfaction. For more information call 212-887-8123.

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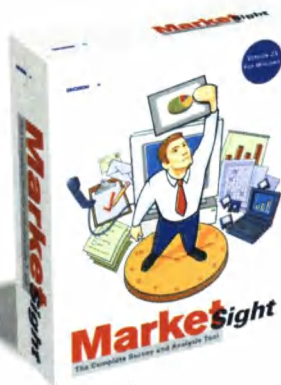
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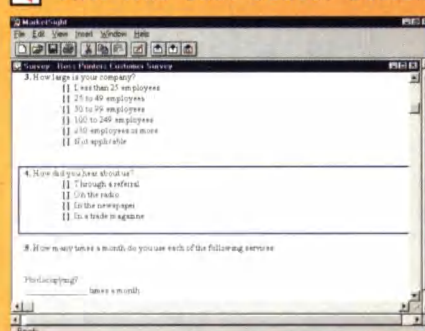
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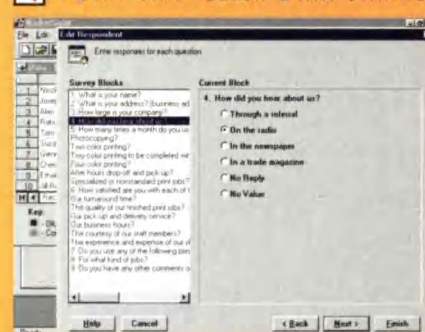


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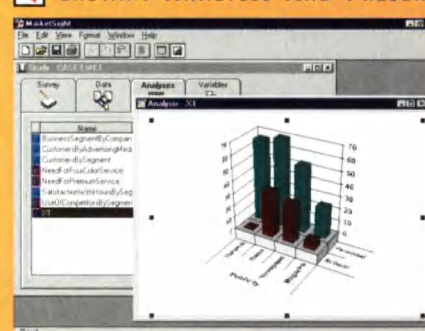
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New version of Bellview from Pulse Train

Pulse Train Technology has released Bellview CAPI for Windows version 3, a personal interviewing program designed to run on laptops, pen computers or touch-screen PCs. When designing a survey, users can create the exact interface they require by applying different colors, styles and fonts to text and backgrounds. The interviewer's toolbar menu is also customizable and can contain any of 25 actions. The buttons used by the interviewer to select answers can be user-defined. All of these features are controlled by the designer of the questionnaire and can be either used to create an in-house style or to

set up different styles to suit different surveys and applications. Enhancements made to the interviewer and survey management facilities include full quota control from the central office. The supervisor is able to view and modify quota targets, either for individuals or groups of interviewers, at any time during the course of a survey, ensuring that interviewing is carried out as efficiently as possible. Users now have greater choice in how assignments are sent and data is received from interviewers. Microsoft Mail is now supported as an alternative to Lotus cc:Mail or diskettes. Because this package is provided automatically with Windows for Workgroups, Windows 95 and Windows NT, users can avoid ad-

ditional costs involved in buying licenses for a separate mail package. For more information call Hank Copeland at 561-852-4000.

SPSS updates Neural Connection

SPSS Inc., Chicago, has released Neural Connection 2.0, its neural network computing product. Neural networks learn patterns directly from data and can be used to predict and classify data. Unlike statistical methods that require initial assumptions about the form of the model, neural networks impose no form on the data. Since neural networks do not force a global equation across the data, they can produce richer models when the data are complex or noisy, or when the form of the data is unknown. The product features a Bayesian network and gives users access to model parameters and weights. Expanded analytic capabilities and product enhancements in Neural Connection 2.0

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SAWTOOTH SEMINARS:

Sawtooth Technologies will hold the following seminars near the company's offices in Evanston, Ill.: conjoint analysis, March 10-11; introduction to ACA/Sensus TradeOff, March 12; choice-based conjoint, March 13. The seminars are designed for researchers who have had little or no practical exposure to the techniques. With the exception of the one-day introduction to ACA/Sensus TradeOff, the classes are not training classes for Sawtooth Technologies products. For more information call Nicole Garneau at 847-866-0870 or fax 847-866-0876.

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Case history

The eyes

The long-running "Find your own road" ad campaign for Saab Cars USA is an example of how to bend conventions without breaking them. Most car commercials try to create energy and excitement with a montage of shots of the automobile taken from every possible angle. The Saab commercials use wildly colorful animation of Saabs traversing highways and byways. The print ads pick up on that theme, choosing a painterly representation of the car over the typical car-parked-on-wet-asphalt approach.

In both formats, the ads definitely cut through the clutter. But do they communicate as well? After testing the TV ads, the company thought it might be a good idea to test the print ones too, says Armeen Gould, marketing research manager for Atlanta-based Saab Cars USA. "We had begun testing the TV ads, trying to get a better sense of people's takeaway, how intrusive they were, how effective they were at increasing consideration rates. We also wanted to get a sense of how people were consuming the print ads. What kinds of messages were getting through?"

"It wasn't that we were having a problem with the print advertising. We had seen a steady increase in the number of consumer inquiries from the ads. But because the campaign took such an unusual approach, we wanted to make sure people were understanding it was an ad for a car and not something else as they flipped through a magazine," he says.

To find out how its print ads performed, Saab used ENVISION, a testing service that uses in-depth interviews, eye tracking and T-scope measures to assess consumer responses to print advertising or packaging.

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The new Saab 900 SE 5-door Turbo is engineered to increase both your pleasure and the joy of driving. You'll find other cars including the Volvo B500GT and the Audi A4* that'll do 0 to 60 in under 7 seconds. It's even easier to drive. And its five-door roomy interior offers more liberation. So any way you open it up, it's there. No wonder it's a Consumer Review Top 10 Sports Car! For a free Saab Excursion Kit, call 1-800-582-SAAB, Ext. xxx. www.saabusa.com



Before and after: Based on consumer responses to the ad above, the body copy was boldfaced to increase readability, the toll-free number was placed on a separate line to make it easier to find and the photo was enlarged to better communicate the car's roominess. While some respondents felt that the

Eye tracking helps Sa

have it

The
Saab 900
Turbo.
Finally, a



5-door you can really open up.



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headline font looked like a child's writing, it worked well with the colorful graphic. "We found that the graphic was very important for breaking through the clutter in the magazine environment," says Armeen Gould, marketing research manager for Saab Cars USA.

Treistman & Stark Marketing, Inc., Hackensack, N.J., and Micromeasurements, Inc., Farmington, Conn. ENVISION's twist on standard packaging and advertising testing is that it aims to speed the development process by allowing marketers to make changes *during* the research process instead of afterward. Rather than bringing mock-ups of the packaging or advertising to the research site, marketers bring prototypes or finished products on computer files. With the files there, changes can be made to the ad or packaging based on consumer input.

"The ability to make changes and then test reactions to those changes was critical for choosing this methodology," Gould says. "That was one of the things that attracted us to it. We could make changes there, break apart the ad and resize it, change the fonts, the size of the type."

"Oftentimes when you're sitting in the back room of a focus group you say 'I wish we could make some changes to the ad and show them that version.' With ENVISION we can modify the ad and show it to the respondents right away," says Joan Treistman, president of Treistman & Stark Marketing, Inc.

Changes aren't made based on the opinion of one respondent, Treistman says. "When you see an issue come up again and again, you know you have something to deal with. It's the negatives, the barriers, the obstacles to communication that come up the fastest."

Treistman stresses that ENVISION is not a substitute for quantitative testing. "The idea is to find out how

ab fine-tune print ads

By Joseph Rydholm/QMRR editor

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A working vacation

Agency uses a little R&R (research & relaxation) to develop ads for RV group

By Joseph Rydholm
QMRR editor

Advertising research

The recreation vehicle industry is putting the pedal to the metal. Sales are up: Dealers sold 471,000 units in 1996, capping a fifth-straight banner sales year. And its prime market, empty-nesters and retirees, is growing nicely. Things seemingly couldn't get any better. But rather than sit back and enjoy the prosperity, the industry has decided to chase new business.

In February, the Go RVing Coalition, a non-profit group that includes RV manufacturers and their suppliers as well as dealers and campground operators, began a \$15 million, three-year television and print ad campaign to promote the joys of RV ownership to first-time RV buyers — specifically, married couples between 30-49, with children.

Building on the success of other industry promotional efforts, the industry figured the time was ripe for its first national advertising program, says Gary LaBella, vice president of public relations for the Recreation Vehicle Industry Association, a member of the Go RVing Coalition. "Through our public relations efforts, we had done well in increasing top-of-mind awareness and the industry was very healthy — the last three years have been the best we've had in two de-

cares. We were poised, given the aging baby boomers, to go after an even greater share of consumers' discretionary time and income," he says.

Two studies commissioned in 1994 to study RV owners and consumer perceptions of RVs pointed toward baby boomers as a possible growth area. (Forty-four percent of RVs are owned by those 55 and older. People between 35-54 own 39 percent.) "Traditionally the core market has been the 50-plus crowd. We've always had the family as a secondary market, but we're trying to focus now on bringing younger people into the market. At the same time we're trying to show people that getting away from the rat race can be a great way to connect with your family. It's almost a necessary thing nowadays. We're trying to reinforce that you need to make time to go away with the kids while they're young," LaBella says.

Bearing the tagline, "Recreation Vehicles. Wherever You Go, You're Always At Home," both the TV and the print spots invite prospective RV owners to visit an RV dealer or call 1-888-GO-RVing to receive a videotape that details the different types of RVs and their features, and offers trip tips and other information.

For 1997, the ads are scheduled to run in three waves through the end of summer. TV ads are airing on cable out-



lets such as Nickelodeon and The Discovery Channel and broadcast programs like *Good Morning America*. Print ads are running in magazines like *Good Housekeeping*, *Parents* and *Country Living*.

To develop the ads, Eisner & Associates, Inc., a Baltimore, Md.-based advertising and public relations firm, undertook a textbook bit of account planning. "We really had three distinct planning tasks," says Joseph Bruce, executive vice president, director of strategic planning, Eisner & Associates. "First, we needed to thoroughly understand what makes the RV owner tick. Then, after developing a profile, we needed to determine how many others fit the same profile. In other words, what is our potential market? And finally, to bring it all together, we crafted a message strategy which really speaks to the target.

"The key question became, how can we position RVs to make the purchase of them attractive to baby boomers now? Not only do they represent more short-term business but it's building the market for the long term, because the more people who are introduced now, the more people will stay with it," Bruce says.

Out of step

The first step was to look at syndicated databases to com-

pare baby boomers who own RVs with those who don't. There were no significant differences in demographic categories like income, education or family size. But some interesting findings emerged from the responses that target consumers gave to various psychographic questions and phrases. Baby boomers who owned RVs were much more likely to agree with statements like "I feel alone in the world," "I feel slightly out of step with the rest of the world," or "I don't feel fulfilled in my everyday life."

"What began to emerge was a picture of a typical RV owner as a person who is slightly out of step with everyday life, who feels held back by the system," Bruce says.

To find out more about RV owners firsthand, the agency formed teams and rented RVs to visit campgrounds around the country. (It wasn't just account planners and their significant others out there testing the RV waters. The agency creative people took the plunge as well. "We got the creative people involved in the process so they were seeing it for themselves. That makes all the difference in the world. They aren't just getting a research report," Bruce says.)

Once at the campsites, to get the conversation going,

continued on p. 54

Qualitative advertising communication checks:

10 rules to guarantee creative choices

Editor's note: Pamela Rogers is president of Pamela Rogers Research, Boulder, Colo.

The qualitative advertising communication check. You know the drill: Someone, either at the agency or the client company, must decide which of several advertising campaigns to produce. Or, for little-known political reasons, somebody wants to "run the advertising by some consumers" prior to a final decision. Alternatively, the advertising decision has already been made, and must be justified with support for the sale. Whatever the reason, a communication check generally means that unknown consumers are summoned to referee a creative play-off, to smooth the often ruffled feathers involved in the creative decision.

No one is particularly fond of this process. Creatives fear their best work will be reduced to a lowest common denominator — the "public as art director," (as in "If only they would darken that typeface a little."). Clients worry that they are basing a multimillion-dollar decision on the whims of a handful of housewives in Stamford. Agency planners and moderators are concerned that their objectivity will be compromised in the

By Pamela Rogers

political fallout. Focus group facilities cringe as they face the inevitable tight turnaround ("We need to talk to 30 women with children under age 6, who use our 3 percent incidence brand daily, by tomorrow.").

In any marketing research career, you will inevitably be asked to participate in this process. So here are 10 rules I have found to be invaluable in my many years of advertising communication work. I follow them because good creative work is too priceless to sell short with shoddy techniques.

1. Choose one-on-one interviews, not groups. Groups bring out the worst in the advertising critiquing process. No traditional focus group allows enough time for the participants to develop true camaraderie and trust, so each respondent must continue to prove himself to the group, and what better way than to appear "above it all" or somehow superior to the masses and the advertising it aims to coerce. Group participants love to trash advertising, both in general (as in what they saw on TV last night) and specifically (as in your ad). They pounce like wolves on the slightest infringement of their narrowly-defined, peer-acceptable rules

of what constitutes good advertising, simply because they are in a group. In a one-on-one the respondent must answer only to the moderator, explaining his choices, emotions, reactions, etc. In a group an individual must answer to and impress seven to nine others, each with their own strict agenda. The communication message quickly becomes muddled. Advertising is an emotional medium, and the 12 minutes allowed any one respondent in a two-hour focus group do not allow for exploration of those emotions.

As the final nail in an ad's coffin, groups despise "Pollyanna" optimism, patriotism and perceived sappiness. The same ads that bring a tear to the eye or tug the heart strings in real life are disparaged as manipulative or silly in group settings. Nobody, at least in a jaded research group, wants to appear to be too happy.

2. Go for the emotion. It is emotion that sells a product and makes advertising work, not a rational selling premise. Research is often viewed as dull and dry, but you can prevent that from happening in your communication check. Use questioning words which bring out the emotional

continued on p. 42

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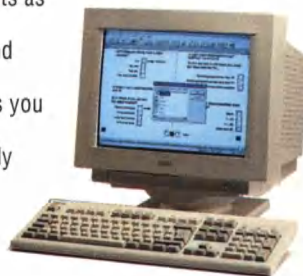
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War Stories

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.

Jim Nelems of the Marketing Workshop reports his firm was conducting a shopper study, talking to customers who had just left a consumer electronics store. The interviewer completed a brief interview with one man, a hurried-looking shopper, who then got into his nearby car and left. Seconds later the store manager rushed out, shouting, "That person you were talking to, he's a shoplifter!"

Turns out the shopper gave his correct name and phone number during the interview and was soon arrested.

That was one interview which validated!

The owner of several focus facilities, requesting anonymity, reports she'd recently opened a beautiful brand new facility. The day it opened, a regular client sent over a huge flower arrangement, which the service proudly displayed. The next day, the owner noticed the flowers were drooping and dying, and decided to toss them out. But as soon as she removed the flowers from the vase, thousands of gnats flew out.

At that evening's focus sessions, respondents were very animated. Not because of the test product but because of the hordes of gnats swarming around them.

Ron Sellers of Ellison Research tells about when he served as a project director at a research company. He was monitoring a telephone interview and all went well until they got to the demographics. The respondent described his marital status as single, then his occupation as "project director for a marketing research company." There was no industry screen on the questionnaire so that wasn't a problem. But Sellers' eyebrows shot up when the respondent indicated his annual household income was \$100,000 or more.

Sellers says his boss heard about that one at salary review time.

Gerald Linda of Gerald Linda & Associates cites in-depth interviews on the subject of men's underwear being conducted among women. (Linda says that most men's under-

wear is actually purchased by women.) One respondent was terrific in describing the criteria of good fit — snugness, ease of movement, support, and so on. When asked how her husband was able to tell her all of this, she replied that she wore the undergarments herself.

Guess we know who wears the pants in that family.

Moderator Saul Cohen of Saul Cohen & Associates reports that just prior to a focus group session with a new client not versed in market research he was going over the screener when she exclaimed, "I can't wait to see this focus group." When Cohen asked why, she pointed to the bottom of the screener and said, "Record sex," except she pronounced it "*Reh*-cord sex."

Along similar lines, I'm sure many of you, like Bill Weylock of Weylock Associates, have seen a self-administered questionnaire, on which, when asked about sex, a consumer wrote in, "YES!"

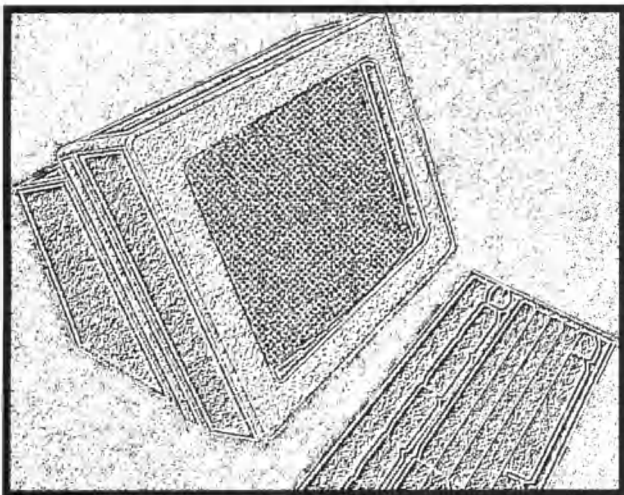
Speaking of consumers with something on their mind, Kristen Pusch of Intertec Publishing recalls reading verbatims on a mall study of sunglasses. When one respondent was asked about the type of person who'd wear the test sunglasses, she replied, "My friend Ralph would wear these sunglasses while riding on the orange clouds floating in my head."

On the answers of consumers like this, multimillion-dollar marketing decisions are made.

Also from the "Where do these people come from?" file, Gary White of Pacific Crest Marketing recalls a focus group he was moderating for a major food manufacturer on the subject of natural foods. One cynical man felt he was making a good point when he said, "These day's everything's natural. Diphtheria's natural."

In future issues, we'll report on more quirky, loopy and strange happenings in the world of market research. If you'd like your story to be told — anything related to research is usable, from spilling soup on your client's new suit to cute answers respondents provide on questionnaires — please call me at 818-782-4252 or, better yet, write it up and fax it to me at 818-782-3014 or E-mail me at artshulman@aol.com. □

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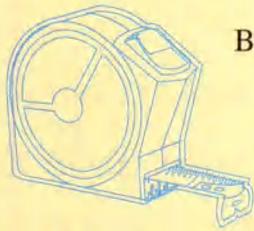
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A measured response

Realize the potential of your advertising with tracking research



By Jerry W. Thomas

Editor's note: Jerry Thomas is president of Decision Analyst, Inc., Arlington, Texas.

The promise of advertising is great. It's an opportunity for a brand to tell its story directly to the ultimate consumer, to build awareness and project a powerful brand image, to create and build brand equity, to bypass the trade and circumvent competitors. In actual practice, however, the promise of advertising is seldom realized. In fact, the opposite is true. Media advertising is probably the most inefficient, least productive expenditure in a typical company's marketing budget. Why is advertising's potential not realized?

First, few companies do basic strategy research to develop a creative blueprint to guide the development of their advertising. Second, few companies pretest their advertising creative to make sure it has a chance to work. Third, even fewer companies track their advertising once it's "on air" to measure the effects of the advertising over time. Advertising tends to be created in an informational vacuum and is rarely evaluated in any consistent, systematic way thereafter. In effect, there is no reliable feed-

back loop, so the advertising muddles along from year to year, never getting any better.

No wonder that many companies have grown weary of traditional advertising and have shifted media dollars into sales promotion and direct-response marketing activities — where effects tend to be immediate, easy to see, and easy to measure. The strategic potential of advertising is just as great as ever, perhaps even greater, since so few companies seem to understand how to create and deploy consumer advertising that really works.

Advertising success

To successfully utilize advertising in the marketing mix, three types of research are essential:

- Strategy research. How advertising works differs from product category to product category, and from brand to brand within a category. This means that each brand must develop an understanding of its consumers and their motivations to serve as a template for creative development.

- Advertising pretesting. Once the advertising creative is developed (either rough or finished), it's really important to pretest the advertising. Pretesting

helps identify outstanding commercials and flags under-performing commercials. More importantly, pretesting provides guidance to the improvement of the commercial, and to the improvement of all future commercials. However, pretesting is not perfect nor foolproof. Pretesting cannot perfectly predict on-air success.

- Advertising tracking. Once commercials are aired, the only way to know if the advertising is working is tracking research. It's the ultimate acid test of advertising effectiveness. As it's used here, the term tracking research refers to telephone interviews among a representative sample of target-audience consumers. These interviews can be continuous (i.e., a certain number of interviews are conducted every day or every week throughout the year) or pulsed (i.e., the interviewing is conducted in waves at discrete points in time, say every three months or every six months).

The tracking questionnaire

A well-designed advertising tracking questionnaire should include the following essential measurements:

continued on p. 46



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Names of Note

E. Kirk Ward, director of consumer and trade research for *Hershey Chocolate North America*, and **William "Jay"**



Ward

Wilson

Wilson, chairman and CEO of *Roper-Starch Worldwide, Inc.*, have been named to the advisory board of the *University of Texas* at Arlington's Master of Science in Marketing Research degree program.

Joseph P. Diamond has joined *Migliara/Kaplan Associates*, a health care marketing research firm with offices in Princeton, N.J. and Owings Mills, Md., as vice president. The com-

pany has also added **David Bracho**, **David Bruning**, **Anne Donusz**, **Christine Huffman**, **Rob Steen** and **Amy Sullivan** as project managers; **Andrea McDonough** and **Glenda Grob** as senior project managers; **David Moak** as account manager; and **Alicia Hines** as project manager/managed care.

Group Dynamics In Focus, Inc., Bala Cynwyd, Pa., has appointed **Robin Kaplan** to its board of directors with



Kaplan

the title of vice president of operations.

Marvin Duvall has joined *Aragon Consulting Group*, St. Louis, as re-

search analyst. **Gregory Wills**, vice president and senior consultant, will manage Aragon's new Denver office.

Erik Andersen has rejoined *Custom Research Inc.*, Minneapolis, as vice president. In addition, **Randi Stillman** has joined the firm as senior research associate and **John Segala** has been named research associate.

Bill Reader has been named account manager for *Polk's Research Sampling Group* in Southfield, Mich.

KGA Advertising, Middletown, Conn., has named **Michael Fox** as account planner.

Walker Information, Indianapolis, Ind., has named **Jeffrey B. Walz** vice president, client services within the energy, communications and technology client services group.

Soumya Roy has joined *Maritz Marketing Research Inc.*, St. Louis, as senior research analyst.

ACNielsen Corporation, Stamford, Conn., has named **Darrial R. Sneed** vice president, investor relations.

Paul Cook has been named director of marketing research and **Melissa Ewen** has been named project manager at *Food Insights*, a Cordova, Tenn., research firm.

Dr. Carol Raffel has been promoted to vice president of qualitative services at *Burke Marketing Research*, Cincinnati, Ohio. In addition, **Lori Turner** and **Kirsten Bech** have been promoted to account executive at the Cincinnati office and **Beth Dauch** has been promoted to account executive at the Dallas office. **Dan Evarrs** has been promoted to senior account executive in the

continued on p. 41

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Six new facilities have joined **FocusVision Network, Inc.**, Stamford, Conn., for video transmission of live focus groups. Now installed and operating are: Wolf/Altschul/Callahan (WAC), New York City; The Field House, Overland Park, Kan.; Savitz Research Center, Dallas; TAI-Chicago and TAI-New Jersey; and Clearwater Research, Boise, Idaho. This brings the number of focus facilities in the FocusVision Network to 45 locations including the U.S., Toronto and London.

Chesapeake Surveys, Inc., Owings Mills, Md., a member of the **VideoConferencing Alliance Network**, has opened a new videoconferencing center which will link it with more than 300 cities worldwide. The company will hold a reception to preview the new center on March 12 from 5:30-8:00 p.m., during which guests will be able to participate in a live demonstration. For more information call 410-356-3566.

DataMind Corp. has moved to 2121 South El Camino Real, Ste. 1200, San Mateo, Calif., 94403. Phone 415-287-2000. Fax 415-524-2180.

Richard Kurtz & Associates has a new phone number, 212-869-9459, and E-mail address, kurtz@ziplink.com.

Strategic Marketing Research and Planning has moved to 16120 Chesterfield Parkway, Ste. 160, Chesterfield, Mo., 63017.

Noble Consultants has changed its address to P.O. Box 2709, Port Aransas, Texas, 78373.

Mediamark Research Inc., New York, has increased the annual sample of respondents to its national syndicated study to 30,000 from 20,000. The increase is in response to client demand for greater reliability of reporting and analysis of MRI data. On average the sample size increase will lower sampling error by 18 percent. The increase will be

achieved by augmenting the present sample plan; no disproportionate increase or decrease among any geographic or demographic element of the MRI sample is contemplated. Full implementation of the increase will require four years of incremental replicates.

Colwell & Salmon Communications, an Albany, N.Y., research and telemarketing firm, has added a new CATI system.

Doris J. Cooper Associates, a full-service data processing company, has moved to One North St., Hastings-on-Hudson, N.Y., 10706. Phone 914-478-0444. Fax 914-478-7637.

MTA-EMCI, a Washington, D.C., strategic planning and consulting firm

servicing the telecommunications industry, has changed its name to **The Strategis Group**.

Decision Analyst, Inc., Arlington, Texas, has opened a Web site at www.decisionanalyst.com. The site includes published articles on marketing topics, free research data for businesses, and free software that performs basic research-related statistical functions.

Aragon Consulting Group, St. Louis, has opened an office in Denver to serve companies in Washington, Oregon, Utah, Idaho, Arizona, New Mexico, Colorado, Wyoming, Montana, Nebraska, North Dakota, South Dakota, Minnesota and Iowa. Gregory Wills will manage the office. For more information call 303-660-3555.

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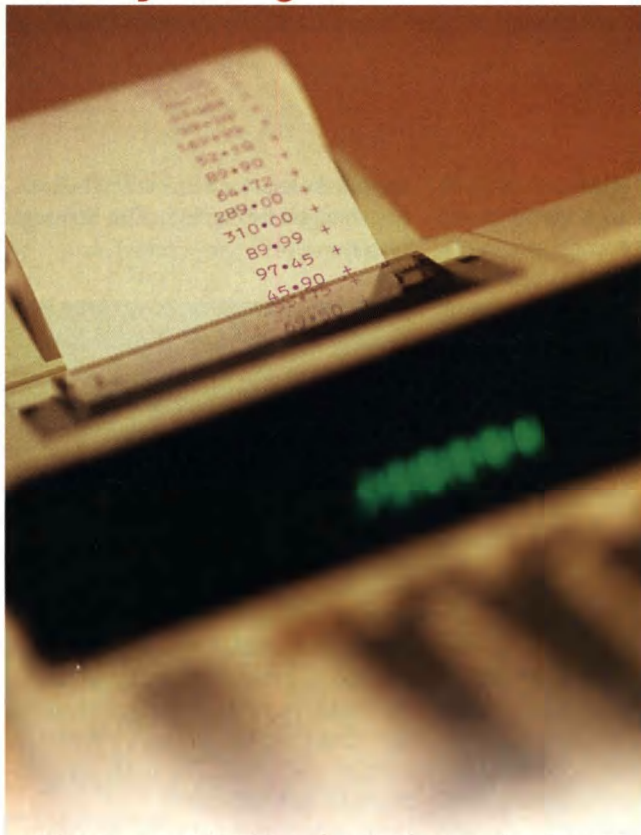
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Editor's note: E.B. Feltser is a freelance writer based in San Diego. She has worked as a marketing research interviewer and survey writer.

A multi-point scale is a wonderful thing. Subtle, nicely objective, neatly quantifiable. Interviewers appreciate them because they're fast and don't entail all the typing or handwriting work associated with open-ends. It's easy to understand why they are so common in surveys.

Consider the basic, garden-variety five-point scale:

5. Extremely satisfied
4. Satisfied
3. Neither satisfied nor dissatisfied
2. Dissatisfied
1. Extremely dissatisfied
6. Don't know (DO NOT READ)
7. Refused (DO NOT READ)

Read it aloud, at speed. You're in an echo chamber, right? That's thanks to numbers 2 and 4. The easy fix is to add an adjective to 2 and 4: somewhat satisfied, maybe, or mildly satisfied or routinely satisfied or whatever. That kind of parallel construction gets a rhythm going that respondents seem to remember more easily. It also cuts down on the "I'm quite satisfied." "Would you say you're extremely satisfied or satisfied?" "Quite satisfied." round-and-round that drives interviewers up the wall and inspires them to key in 5 or 4 as the mood strikes, just to get on with the survey. And in fact, "satisfied" and "dissatisfied" are open-ended emotional states that logically include all other levels of satisfaction or dissatisfaction, including the "extremely" level. It's no wonder some respondents have a tough time nailing that one. Incidentally, why does the mid-point have to be so user-unfriendly? Why not a simple "I'm

The numbers game: refining multi-point scales

By E.B. Feltser

neutral about it"? It takes less time to say, and surveys, especially long ones, are like Olympic track events: seconds count, and they add up fast.

Don't know (DO NOT READ) and the mid-point paradox

"Gee. I've never tried it. I guess I'd give it a 3. That's neutral, right?" Thus does the respondent valiantly try to fit the square peg into the round hole. But what's a poor interviewer to do? The classic instruction is to go with the respondent's numerical rating. And yet, it must be important from a marketing standpoint to distinguish between potential devoted consumers (I've never tried it) and experienced but disenchanted ones (It's OK, nothing special. Give it a 3.).

Perhaps it's time to replace the classic instruction with something more useful to an interviewer. Treating "don't know" as a naughty little secret instead of a viable response forces interviewers to make subjective (often highly subjective) choices, and that turns mid-point quantification into mush. Besides, the endearing thing about most respondents is that they truly do try to give honest opinions within the response framework. Even those who are aware that "don't know" is an option tend to ignore it whenever they can. Tipping the respondent to the "don't know" option cuts down on such pleasant responses as "I've already told you three times I never heard of it. I don't want to answer any more of these stupid questions. Good-bye!" Anything that cuts down on mid-terms is a thing of joy and delight to an interviewer.

Multi multi-point scales

(Q. 22) Now, using a seven-point scale where 7 means very satisfied. . .

(Q. 24) Now, using a five-point scale, where 5 means liked

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very much. . .

(Q. 26) Now, using a seven-point scale where 7 means disliked very much. . .

Well, OK, in truth it's been a while since I've done a survey where the multi-pointers reversed polarity in mid-stream (thank Heaven for small favors!). But why do some topics warrant a cruder response than others — a five-pointer set like a grubby medieval serf amongst the aristocratic, fine-tuned seven-pointers? From the interviewer's point of view, it means using time to explain the new scale, and then using more time to reintroduce the returning seven-pointer. Most respondents grasp the concept of a multi-point scale quite easily, but too much shifting around gives even the sharpest of them whiplash. Worse, they get confused, and even more time is used up explaining the scale yet again to bewildered respondents ("Five. No, seven. Seven? Is seven the top this time?").

Words, words, words

Time the following while you read it aloud:

"You mentioned that you have purchased Dy-No-Mite Drain Cleaner. Now I'd like to get your opinion of that product. Would you say you are:

1. *Completely satisfied with the product*
2. *Somewhat satisfied with the product*
3. *Neither satisfied nor dissatisfied with the product*
4. *Somewhat dissatisfied with the product*
5. *Completely dissatisfied with the product."*

Now, time this version:

What's your opinion of Dy-No-Mite Drain Cleaner? Are you:

1. *Completely satisfied with it*
2. *Somewhat satisfied*

3. *Neutral about it*

4. *Somewhat dissatisfied*

5. *Completely dissatisfied"*

The second version takes about half as long to read, and holds the respondent's interest better because it comes on faster. Like reading an exciting novel, respondents should get caught up in the challenge of the next question before they have time to reflect on how long they've been at it. Time is of the essence to interviewers as well: the more dialings, the more completes. Anything that needlessly uses up time in a survey jeopardizes the chances of the complete and reduces the interviewer's total dialings for the shift.

The inappropriate multi

I recently worked on a survey that used a multi-point scale to determine whether a business had certain amenities. Let's say it involved the respondent's favorite restaurant (it didn't, actually). How do you interpret a mid-point scale response to the question of, say, whether the restaurant had full menus? It had menus but not full ones? It had full menus but only on alternate days? It had full menus but only gave them to special customers? That's an example of a survey writer getting carried away with the wonders of multi-point scales (or, more likely, just getting sloppy). Whatever the reason, it wasted a lot of interviewing time as many respondents diligently worked out mid-point choices, although it did provide some giggles for respondents sharp enough to notice.

Well-structured, carefully worded (and appropriate) multi-point scales are a great tool. Streamline them and that purring sound will be interviewers throughout the land murmuring their thanks. □



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Working with a consultant: who, why and how

By Paul M. Gurwitz

Editor's note: Paul Gurwitz is managing director of Renaissance Research & Consulting, New York.

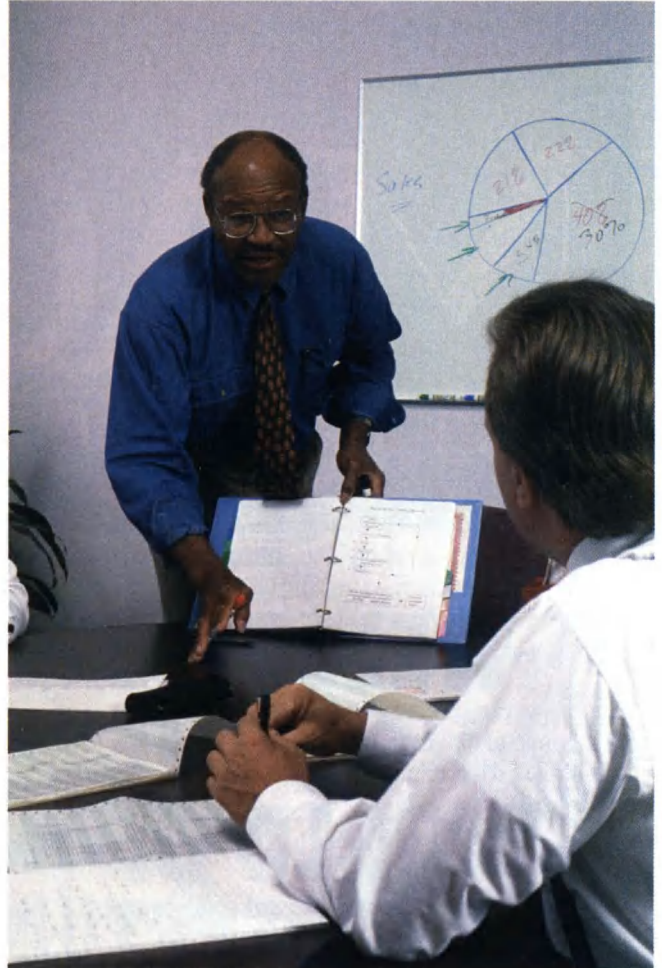
Over the last several years, consultants have become a fact of life in marketing. Whether you are in corporate marketing, an advertising agency or a market research supplier, unless your firm has a blanket no-outsiders policy (and relatively few do), you will probably have to deal with hiring consultants — if you have not already. In this article, I will discuss some of the issues surrounding this decision:

- Why hire a consultant
- Barriers to hiring a consultant
- What kind of firm to hire
- How to pay
- How to get the most out of the consulting relationship.

Why hire a consultant?

Firms choose to hire consultants for a number of reasons.

1. Specialized expertise. A company might decide to hire a consultant to provide expertise that none of their in-house personnel has. This is particularly true if the skill is a rare one, or if it is not needed on a full-time basis. The consulting option can be a particularly attractive one in cases where



visibility is an advantage — where hiring a “name” consultant can lend additional credibility to the outcome.

2. Political sensitivity. Sometimes a consultant is brought in to perform tasks that are considered too sensitive for the organization’s full-time employees, or when the employees have an interest in a particular outcome. In this regard, the consultant, who has no long-term employment interest with the client firm, can serve in multiple capacities: as a relatively impartial observer and reporter, as well as a “lightning rod” for policy disagreements that might endanger the job of a regular employee.

3. Overflow. Firms often choose to “go outside” when their workflow overtaxes their regular staff. This use of consultants offers the advantage of flexibility: It allows tailoring the workforce to rapidly-changing needs, rather than going through repeated, disruptive cycles of hiring and firing.

4. Lowering overhead. Many companies choose to outsource simply to lower overhead. Using consultants rather than employees for certain tasks eliminates many of the fixed expenses associated with employment — insurance payments, vacation, sick days, social security payments. In addition, the amount of government regulation associated with hiring consultants is noticeably less than is the case with employees. This is often the reason that small and medium-

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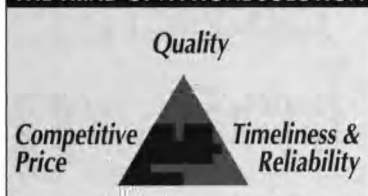


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sized companies go the consulting route, because it can allow them to get a higher level of expertise for a given payment level.

Barriers to hiring consultants

Just as companies hire consultants for many different reasons, they also have many reasons for not hiring them — some justified, others, on examination, not so.

1. Expense. Some companies shy away from consultants because their hourly rates are much higher than a full-time worker's would be, pro-rata. In reality, this represents a trade-off between fixed and variable costs that (all other things being equal) depends on the length and size of the assignment. It probably will not make sense to pay consultant's rates if there is enough work to keep a full-time employee busy for a year, for instance. However, the shorter the length, or the lower the intensity, of the assignment, the more it makes sense to trade a higher hourly rate for lower long-term fixed costs.

In addition, where there is periodic but less than full-time work, a retainer arrangement can often be made to trade some level of income stability (short of a full-time salary) for a preferential hourly rate. We'll discuss this further below.

2. Control. Other firms are reluctant to hire consultants because they feel that it is harder to maintain control over the process and output of a consultant. This objection is also well-taken in certain circumstances, because some jobs are more amenable to being farmed out than others. In general, the most appropriate tasks for a consultant are those that are relatively well-defined (or at least are amenable to definition), separable and do not require being immersed in the corporate culture for their solution.

Thus, the types of problems that suit the consulting mode best are those for which a concrete work plan, time schedule and deliverables can be specified and agreed on. By contrast, tasks that are amorphous, or whose requirements change repeatedly through the project life-cycle, tend to be the ones that pose problems of control when they are given over to a consultant.

There is sometimes another issue of control as well. That is the feeling that

the consultant, who may have many other clients, may give less to any particular client firm than will an employee who depends on the company for his whole paycheck. To a great extent, this particular issue is illusory: marketing (or any other business culture, for that matter) is a small community. No matter how many clients a consultant has, he won't keep them for long if it gets around that he is hard to work with, or doesn't deliver! Beyond the general fear, the issue is often one of matching the right consultant to the right client and the right job, which we'll explore below.

Large or small: What's right for you?

Consulting firms come in all sizes, from individual practitioners to major establishments with famous names, scores of partners, and hundreds of analysts. What type of firm are you better off with? It depends — on your goals, on what kind of project you have, and on your own structure. Both large and small firms have their own distinct advantages.

Large firms offer a well-known name and impressive background; in some cases these can be crucial advantages, as with a politically sensitive issue in a large corporation. In such a case, a big-name consulting firm can mean credibility in front of a potentially hostile audience. Larger firms, by their very size, also offer flexibility, both in terms of timing and capacity. The multi-consultant firm is more likely than a smaller firm to be able to deploy its personnel to handle very large projects on very short notice.

By contrast, smaller firms' major advantage is cost-effectiveness. When you deal with them, you will generally be dealing with a principal, or at least a senior member of the firm. With a big-name consulting firm, however, unless you are prepared to pay astronomical rates (and perhaps not even then), you are unlikely to be dealing with a senior partner on a day-to-day basis. Instead, most of your contacts will most likely be with relatively junior analysts.

In addition, all other things being equal, any given single project is going to be relatively more important to a smaller firm than to a larger one. So, unless your company is in the Fortune

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100, and your project runs into the seven figures, it is likely that a smaller firm will provide a greater level of day-to-day contact. Moreover, since a small firm probably has fewer projects going on simultaneously, your project is less likely to get lost in the shuffle there than at a larger firm.

Accordingly, if you are yourself a large company, have a high-level problem with political implications, or a problem that does not require a great deal of senior-level contact, you're probably better off with a large consulting firm. On the other hand, if your problem requires a large amount of day-to-day high-level professional contact, and the name value of a major consulting firm is not critical, go with a smaller firm.

Paying a consultant

There are basically three methods of paying a consultant; which one you negotiate will depend principally on the nature of your project.

1. Project flat rate. In this arrangement, the consultant asks a flat fee for a certain specified deliverable, based on his estimate of the number of hours the project will take.

These are the most advantageous terms for both consultant and client when the project is well-defined and the deliverables can be specified fairly precisely. The client knows the final bill in advance, so there is no risk of "sticker shock" at the end of the project. The client's sense of security is thus an advantage to the consultant as well; and the consultant's own experience in bidding is his control against being underpaid for the job. Commonly, such a bid will carry a 10 percent contingency

overrun against unforeseen circumstances.

2. Hourly rate. Sometimes, however, a task cannot be defined in advance precisely enough to allow a consultant to make a firm and fixed flat-rate bid. In such cases, a client may agree to pay an hourly or daily rate, sometimes with an overall upper limit on the fee. This method permits using a consultant on a developing project without requiring the consultant to risk grossly underestimating the cost.

However, the hourly method carries with it some anxiety for the client, who is "on the meter" and consequently never knows how much the final bill will be until the job is over. With such an arrangement, close and continuing contact between client and consultant can avoid unwelcome surprises when the bill is presented.

3. Retainer. A retainer — a fixed fee paid a consultant periodically against work to be delivered later — is also used in certain cases. A retainer is appropriate when one wants to be able to confer with the consultant periodically; it avoids having to negotiate a fee each time.

In addition, a retainer can be used in the case of a long-term relationship; in such a case, the consultant commonly trades a discount on his hourly rate for the security of a certain number of hours committed.

There are many different ways to specify a retainer. It can cover a certain number of hours per month, or a flat rate for certain types of work (questions answered over the phone, for instance). The retainer can be paid against work owed, in which case unused hours are "banked" to be used later at a given

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hourly rate; or else, the arrangement can have a "use it or lose it" provision, in which hours not used in a given period are not banked for future use. A retainer can be for a fixed duration, or can be terminated by one or both parties with an agreed-on notice period. Finally, if the retainer is paid against a defined amount of work, additional work can be bid either at the retainer rate, or the consultant's normal rate.

How to get the most out of a consultant

Because of the nature of the consulting relationship — a working relationship that is specific in terms of objective, and limited in hours and duration — you are more likely to have a satisfactory outcome from the experience if you bear certain things in mind.

1. Start with clear objectives. The more closely you can define the outcome you want, the more likely

the consultant will be able to deliver it. Remember also that the consultant, by definition, will not come in with your understanding of your firm's culture or the problem's background. So, the more detail you can fill in, the more the consultant will have to work with.

2. You're the expert on your own business. In general, a consulting relationship implies a division of labor: you are the substantive expert, and the consultant is the technical expert.

That is, you know your firm and can articulate its problems; the consultant has specialized tools with which to solve the problems. This tends to be true even when the consultant is a subject specialist. Although he may be experienced in your category, he still does not come into the picture with the detailed knowledge of your specific situation that someone who has worked in your environment for months or years.

This division of labor implies that you will get more mileage out

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of a consultant if you expect him to be a technician, rather than a magician; your satisfaction with the outcome will probably rise in direct proportion to the degree you take an active role in the relationship, rather than simply expecting the consultant to "deliver" a solution out of thin air.

3. Keep in touch. Along the same lines, the more contact you have with the consultant all through the project life-cycle, the greater the chance of a satisfactory outcome. This is because business problems, no matter how well-defined at the start, tend to be somewhat fluid. Their nature changes. Unanticipated questions come up in the middle of a project, or a project's preliminary results can spawn new concerns.

This can create a problem if your contact with the consultant is limited to the beginning of the project. If you are not available for input when questions come up, the consultant will use his own assumptions to answer them, and they might not be the assumptions you would have made. For this reason, the most successful consulting relationships are those that are effectively partnerships between the consultant and the client, with a continual interchange of information throughout the project life cycle.

Not for everybody

Obviously, the consulting route is not for everybody, all the time. There are organizations into which consultants simply do not fit, and even in establishments that can benefit from consulting, it is more appropriate in certain situations than in others. However, there are probably even more companies that could profit from using consultants that don't, because of unfamiliarity with the process, or perceived barriers that don't have to stand in the way.

A greater understanding of what the consulting relationship is and how it works will, hopefully, clear the way for more firms to use consultants to their mutual benefit. □

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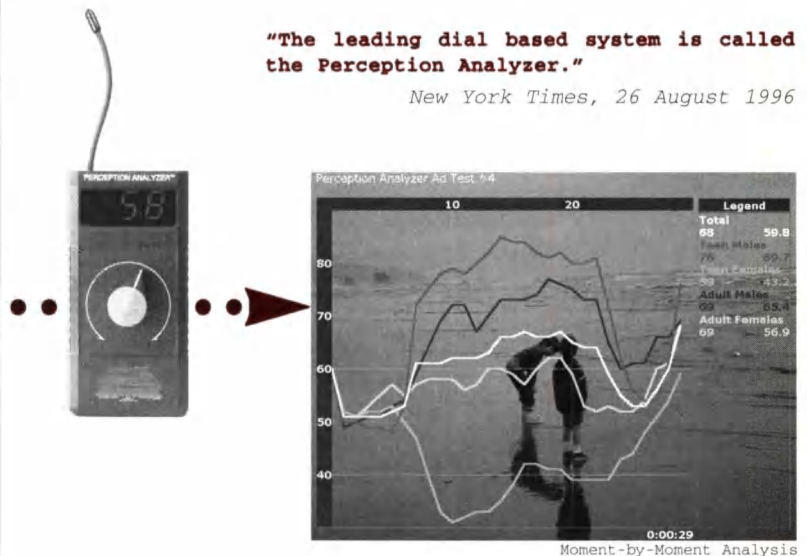
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Survey Monitor

continued from p. 6

bulletin boards, E-mail, Web sites and others," says Diane Bowers, executive director of CASRO.

The CASRO survey on "Survey Research and the Internet" showed:

- Seventeen percent of managers/executives surveyed say they have used data collected from Internet surveys.

- Forty-seven percent of those who have used such data say it was collected either exclusively in-house or both in-house and by outside research firms.

- Forty-nine percent say they have exclusively used such data collected by outside research firms.

- Asked if they will continue to rely on outside research firms or do more of their research in-house, 49

percent of such respondents say they will continue to look to outside help. However, 38 percent said they expect their companies will do more survey research in-house.

- Sixty-four percent of those who have used data collected from Internet surveys say they expect to conduct or purchase more such research during the next five years.

- Even among those who have never conducted or purchased Internet survey research, 42 percent say they expect to do so in the next five years.

- Those who have used Internet survey data collected by outside research firms say they hire such firms to conduct: demographic research (18 percent); product research (16 percent); non-panel consumer attitudes and behavior measures (11 percent).

- Perceived advantages of Internet surveys: faster turnaround (30 percent); best way to reach certain target populations (23 percent); less expensive than other forms of research (20 percent); advantage of being able to do such research in-house (6 percent).

- Perceived disadvantages of Internet surveys: non-random and non-representative samples (44 percent); not enough people are on the Internet (26 percent); general "bias" (18 percent).

The CASRO survey was conducted among 305 middle managers and executives at Fortune 2000 companies. They are all primary decision makers/

advisers regarding Internet marketing applications at their respective companies. They work in departments ranging from marketing, information systems/services and marketing/international research to corporate/strategic planning, public affairs and communications. Only one employee per company was interviewed. For more information or a copy of the survey call Diane Bowers at 516-928-6954.

When it's time to get away, Americans go far

A Maritz AmeriPoll found that "farther equals better" was the rule for America's summer vacationers last year. Among those who planned a vacation between May 1 and September



31, 1996, 61 percent said their destinations were more than 500 miles away from home and 38 percent said they were traveling 1,000+ miles away from home. Twenty-three percent planned to go 500-999 miles. Surprisingly, only 5 percent were headed for the more convenient vacation spots, located less than 100 miles away from their homes. Maritz AmeriPoll is a national consumer opinion poll conducted regularly by Maritz Marketing Research Inc., St. Louis. Results are based on telephone interviews with American adults. Accuracy of the results is within ± 3.09 percent.

Last year's summer travelers preferred the southern states (states were divided into census regions) as vacation spots. Forty-four percent of them vacationed in the south. Western states were also popular; 31 percent selected this region as their vacation destination. Sixteen percent were headed for the midwest, and 12 percent are planning vacations in the northeast.

Ten percent of Americans taking vacations last year said they planned to venture outside the U.S. Among these travelers, Europe was the most popular international destination. Thirty-four percent of international

vacationers said they would visit Europe last summer while Canada and Mexico attracted 15 percent and 12 percent (respectively).

When asked what types of activities they planned for their getaways, more than one third (34 percent) of American travelers said they planned on sightseeing (respondents could choose more than one activity). The second most popular activity was visiting family and friends (30 percent) while 28 percent had camping or fishing on their vacation agendas. Other popular activities included theme parks (11 percent) and boating (9 percent). For more information 314-827-1610.

Corporate sponsorship to reach record high in '97

North American companies will spend \$5.9 billion on sponsorship in 1997, a 9 percent increase over 1996's \$5.4 billion, according to the 13th annual projections of *IEG Sponsorship Report*, the biweekly newsletter published by IEG, Inc., Chicago.

Total spending will reach a record high, though the growth rate will experience its first single-digit increase since IEG SR began tracking sponsorship outlays in 1984. The projected slower growth reflects the lack of blockbuster events in the next 12 months, as well as the resolve of many companies

to spend less on fees and more on promoting their existing involvements.

Although sluggish in comparison to previous years, sponsorship's projected growth continues to surpass the outlooks for advertising and sales promotion. McCann-Erickson Worldwide anticipates a 5.6 percent rise in ad spending for 1997, while Veronis, Suhler & Associates' communications industry

forecast projects a 5.6 percent rise in sales promotion expenditures for 1997.

Entertainment tours and attractions will be the only category seeing growth in its share of total sponsorship revenue in 1997, \$650 million or 11 percent of the total. The first increase for entertainment since 1992 still leaves the category a distant second to sports properties, which will receive \$3.84

Sponsorship spending in North America by type of property*				
	1997 [†]	1996	1995	1994
Sports	\$3.840 billion (65%)	\$3.540 billion (66%)	\$3.050 billion (65%)	\$2.850 billion (67%)
Entertainment tours & attractions	650 million (65%)	566 million (10%)	488 million (10%)	425 million (10%)
Festivals, fairs, annual events	558 million (9%)	512 million (9%)	466 million (10%)	382 million (9%)
Causes	535 million (9%)	485 million (9%)	423 million (9%)	340 million (8%)
Arts	354 million (6%)	323 million (6%)	277 million (6%)	255 million (6%)
Total	\$5.9 billion	\$5.4 billion	\$4.7 billion	\$4.25 billion

*Source: IEG Sponsorship Report
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\$120 million to \$125 million Philip Morris Cos.	Visa Int'l. Nike, Inc.	United Airlines, Inc. Shell Oil Co. Nestlé USA, Inc. Coors Brewing Co. BellSouth Corp. UST, Inc.
\$115 million to \$120 million Anheuser-Busch Cos.	\$30 million to \$35 million Sprint Corp. MasterCard Int'l., Inc. The Quaker Oats Co. Sara Lee Corp.	\$10 million to \$15 million The Gillette Co. American Express Co. Nissan Motor Corp. U.S.A. Xerox Corp. The Home Depot, Inc. Time Warner, Inc. Mars, Inc. Sears, Roebuck & Co. MBNA Corp. UPS of America, Inc. The Chase Manhattan Bank NationsBank Corp. General Mills, Inc. Microsoft Corp. Hooters of America, Inc. Thomson Consumer Elect., Inc. York Int'l Corp.
\$90 million to \$95 million The Coca-Cola Co.	\$25 million to \$30 million Du Pont Co.	
\$70 million to \$75 million General Motors Corp.	\$20 million to \$25 million Bausch & Lomb, Inc. American Airlines, Inc. Delta Airlines, Inc. Ford Motor Co. John Hancock Financial Services The Procter & Gamble Co.	
\$60 million to \$65 million PepsiCo, Inc.	\$15 million to \$20 million Motorola Inc. Reebok Int'l Ltd. Texaco, Inc. MCI Telecomm. Corp. Pennzoil Co.	
\$50 million to \$55 million AT&T		
\$45 million to \$50 million Eastman Kodak Co. RJR Nabisco Inc.		
\$40 million to \$45 million Chrysler Corp. IBM Corp.		
\$35 million to \$40 million McDonald's Corp.		

billion, slipping to 65 percent of the total in 1997.

IEG SR projects worldwide spending in 1997 to grow to \$15.3 billion, 13 percent higher than '96 expenditures. Nearly \$4.5 billion will come from European corporations, \$3.1 billion from Pacific Rim companies, \$1 billion from Central and South American businesses and \$800 million from firms in all other countries. For more information call 312-944-1727 or visit the IEG Web site at <http://www.sponsorship.com>.

**Sponsorship growth compared to
advertising and promotion***

Year	Advertising	Sales Promotion	Sponsorship
1997†	5.6%	5.6%	9%
1996	7.6%	4.6%	15%
1995	7.7%	4.6%	11%
1994	8.7%	5.4%	15%
1993	5.2%	7%	17%
1992	4%	10%	13%
1991	-1.5%	8%	11%
1990	5%	6%	19%
1989	6%	6%	22%
1988	7%	7%	20%
1987	7%	8%	30%
1986	7%	9%	35%
1985	7%	13%	18%
1984	9%	14%	113%
1983	16%	17%	250%

†Projected

* Source: IEG Sponsorship Report; McCann Erickson Worldwide; Veronis, Suhler & Assoc.

**Consumers seek
information, not
entertainment, on-line**

Americans are gravitating to on-line services and the Internet in record numbers, but they're not going on-line for fun and games. Information, communication and research are the key forces luring consumers to cyberspace.



According to a new survey by Arlington Heights, Ill.-based Market Facts Inc.'s TeleNation polling service, 82 percent of people who are familiar with the Internet said they go on-line primarily to gather news and information; 80.5 percent said they use E-mail, and 69.1 percent log on to conduct research. The activities on which these people spend the most time include E-mail and research — both were cited by 27.6 percent of respondents, and 18.8 percent said they spend most of their on-line time gathering news or information.

On the flip side, 39.3 percent of those who've been on-line at least

once in the past six months said they participate in bulletin boards; 25.3 percent use cyberspace for chat sessions; 23.8 percent use it for games; and just 14.9 percent use on-line shopping applications. These activities were mentioned as primary on-line activities by fewer than 5.5 percent of this group.

The fourth-annual survey of interactive media was conducted for *Advertising Age* magazine September 6-11, 1996, with randomly selected Americans age 18 and older. Market Facts used a general questionnaire on 1,000 people. To get a close look at dedicated on-line users, Market Facts posed additional questions to 500 people who have been on-line at least once in the past six months. Both surveys were conducted by telephone and have a margin of error of 3 percent.

"The data is striking, because on-line entertainment applications are taking a back seat to information usages," says Tom Mularz, V.P.-group manager of TeleNation. "When the Internet started growing a few years ago, everyone thought Americans would go on-line primarily for entertainment. That isn't happening."

In 1994, the second year Market Facts conducted this study for *Advertising Age*, 45 percent of respondents said they would be interested in on-demand movies or TV programs and 28.1 percent cited E-mail. This year, 42.6 percent of the general respondent pool cited E-mail, and the percentage of people interested in movies or TV shows on-demand declined to 35.8 percent.

"People are using the Internet to research products, or to help with their homework, or to gather information for their jobs," says Mularz. "They're not going on-line to relax and have fun."

The general population survey asked people about their interest level in a variety of on-line applications. Respondents said they would be most interested in researching products and services before buying them (53.2 percent); conducting research for work or school (50.1 percent); viewing and participating in educational TV shows and computer sites (44.2 percent); sending E-mail via computer (42.6 percent) and making

travel reservations (38.6 percent). Respondents were much less interested in on-line applications that are entertainment-driven: 26.5 percent said they would be interested in getting statistics or information about teams during sporting events; and 23.5 percent said they would use chats with friends or celebrities.

The interest in commercial applications also was lower than that for information-driven services. Just 23.5 percent of respondents in the general survey said they would be interested in in-

teractive shopping services, and only 18.2 percent cited interest in on-line grocery shopping.

In the four years that Market Facts has been tracking consumer awareness of and interest in cyberspace, awareness has skyrocketed. For example, awareness of the World Wide Web grew to 82 percent this year from 44.7 percent last year. Awareness of the Internet grew to 93.5 percent from 82 percent last year. For more information call 847-590-7000.

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It's boomer, echo boomer or bust

According to a comprehensive U.S. population demographic study commissioned by KGA Advertising of Middletown, Conn., businesses that continue to view 18-34 year-olds as the lifeblood to their success are either currently on life-support systems or have already succumbed to this previously misunderstood silent killer.

The marketplace has already lost thousands of once-powerful industry leaders nationwide to this insidious ailment. The motorcycle industry demonstrates the most dramatic example of a business that was wiped out because of its precipitous fall in sales that hit bottom in 1991. Overall motorcycle unit sales plummeted from 1.2 million at its height in the mid-'80s to an anemic 400,000 over the next five years.

KGA Advertising, which had the northeastern American Honda Motorcycle account at that time, went on a mission to find out the reason why an entire product category was wasting away. Was it specific to the motorcycle industry? Was it contagious? And what preventive steps could be taken to avoid it? The Strategy and Research department at KGA Advertising discovered what even Honda could not, and realized that virtually any business that solely targets people born between 1966 and 1976 was susceptible. What is this conqueror of formidable businesses? According to Ken Gronbach, president and CEO of KGA Advertising, "It's the birth dearth — a cyclical population phenomenon that has historically impacted our economy but that has not been widely recognized or understood before now and as a result has taken marketers by complete surprise."

It's the enormous group of "baby busters," people born between 1966-1976, according to Gronbach, that has moved into the coveted 18-34 age group that the boomers, a market of some 76 million people, have officially exited.

As the first boomers turned 50 this year, this massive trendsetting market with its unprecedented buying power that has commanded the marketplace for the last 30 years has begun its meta-

morphosis from the youth market into the mid-life market. The boomers leave a huge void in the marketplace that the birth dearth generation can't fill.

"Simply put, we're missing some 38 million consuming Americans in the baby bust generation!" says Gronbach. That's clearly a prescription for disaster for those businesses that have yet to retool their marketing strategies away from the youth market to either the aging boomers or the next boom generation, the echo boom.

This generation, according to Gronbach, "will be the panacea for whatever marketing strategies currently ail you, for those businesses savvy enough to be able to target them." The echo boomers, aged 19 and under today, will move into the 18-34 year-old age group within the next 10 years and will represent the predominant generation in America.

The next big scare that business is going to face will be the realization that there are millions fewer people to hire in the 20-30 year-old age group because of the birth dearth. Who is going to fill management positions to decide what

products to sell and then, who is going to sell these products at retail? What impact will this have on marketing strategies?

"It will change what we advertise and who we advertise it to," Gronbach says. "Historically it was the 18-34 year-old market that made business happen. If you had them, then you had the core and you had it made. Now that is not the case. This once sought after, formidable 18-34 year-old market is going to be relatively meaningless by its greatly reduced size," Gronbach says.

So what does this all mean? "If you're in business and selling either a product or service, you had better be cognizant of these three markets — the boomers, the baby busters and the echo boomers. Marketers better be prepared with both a short- and long-range strategic plan that understands who to target and how to reach them; or what starts out as appearing as nothing more than a temporary upset to the health of your business, may not only flatten your sales, it may flat-line your company," Gronbach says. For more information call 860-347-6626.

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Product & Service Update

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give users flexible tools to build more powerful models using up to 32,000 cases in training and running their model. The program's user guide features step-by-step examples. Neural Connection 2.0 has a complete set of 17 data management, modeling, forecasting and presentation tools. To create an application, the user selects items from a toolbar and places them onto a graphical workspace. The intuitive workspace graphically displays the model's logic and speeds analysis. The product also includes a Net Agent scripting language that allows users to automate an application. For more information call 800-543-5815 or visit the company's Web site at <http://www.spss.com>.

Service gathers field reports on retail conditions

Up-to-the-minute field reports for immediate decisions on retail conditions are now available through a telephone-based data service from National In-Store, Sarasota, Fla. The new service, called Shelf-Trac, collects information from the NIS national operating staff of 1,400 merchandisers. Merchandisers access Shelf-Trac from any touch-tone phone, 24 hours a day, seven days a week. After passing a security check by entering a password and PIN number, a voice recording prompts them to log in the desired information using the touch-tone keyboard. Customized telephony software captures the data and transmits it to a computer file where it is tabulated. Shelf-Trac can gather several types of information, including numerical findings, yes/no answers and multiple choice responses to questions. The service has been used to document inventories, identify and correct product "out-of-stock" conditions, verify display setups and measure shelf space allocations. For more information call 941-953-3866.

Software gives AmEx merchants access to market data

American Express Travel Related Services Co., New York, has introduced SE InSight, a software package that enables businesses to download aggregated data from American Express on customer transactions and market competition. Similar information has been available to American Express merchants in paper reports for several years. But with electronic delivery and management through SE InSight, the data is easier to access, analyze and customize. With the software and a standard PC and modem, merchants can measure their American Express business performance and customer demographics, make comparisons to industry averages and chart long-term business trends for about \$200 per year. The software's marketing intelligence consists of grouped competitor information and consumer demographics. The two sources of data are the Business Profile and Cardmember Origin reports. The Business Profile report summarizes a merchant's American Express card transaction by card type, geography and gender. The Cardmember Origin reports ranks a merchant's top markets by ZIP code, designated market area (DMA), standard metropolitan statistical area (SMSA) or country. The software also allows merchants to compare their own spending activities with the competitive marketplace. SE InSight software has a look and feel similar to popular business applications, featuring an icon toolbar, color graphing, quick-print and data sorting capabilities. The program can export data to spreadsheet and database programs. Users can create printable pie chart and bar graphs illustrating customer profiles, market share, long-term trends and other analyses. For more information call 800-352-9814.

Names of Note

continued from p. 20


Cincinnati office of Burke Customer Satisfaction Associates.

Capstone Research, Inc., Lyndhurst, N.J., has promoted **Bonnie Reenstra** to manager, product retrieval services.

Atlanta-based *Elrick & Lavidge* has announced a number of staff additions and promotions. At its San Francisco office, **Todd Jacobson** has been

named vice president, **Timothy Gaughan** has been named account director, and **Patrice Sandoval** has been named senior project manager. In Atlanta, **Teresa Minshew** has been named project manager-MSD and **Denise Krause** has been promoted to project manager. Other promotions include: **Brian White** to vice president at the Kansas City office; **Pat Taylor** to branch operations manager at the Chicago office; and **Eric Hogue** to account manager at the Dallas office.

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Communication checks

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reactions of respondents, phrases like "Tell me your feelings as you were watching that commercial," "How do you feel about that idea?" or "Do you relate to that or not?" Urge your respondents to relax, watch the commercial as if they were viewing at home, and encourage them not to memorize specific facts and details as if they were participating in a school quiz. Watch the respondent's reactions, vocalizations and body language during your presentation of the ad. Are they laughing, sighing, stonically processing dull information, or eyeing the cookies in the middle of the table? How are they talking about the ad — are they animated and involved or detached and analytical? All of these cues will be as valuable in painting the final results as answers to the questions themselves.

3. Keep questioning brief on any one ad. After the first few questions in an interview, feelings are abandoned and respondents lapse into rationalization and intellectual critique — the death knell for creative work. I have seen endless discussion guides and interviewers who question respondents ad nauseam about an ad. The answers quickly take on an ivory tower tonality which is meaningless in the real world. In reality, viewers or readers of an ad make an instantaneous, emotional judgement about it, and it is that moment which a communication check must seize, not subsequent rationalizations about the ad, its political incorrectness or appropriateness for the product. That decisive moment can only be suspended through four or five questions, so keep the touchy-feely questions upfront; otherwise an answer will be given from rational brain memory, not the heart.

4. You need quality, not quantity, in your interviews. You can get a good read on your audience with only 15 to 20 interviews per campaign. Remember why they call it qualitative research; you are relying on the skill of the interviewer and other research-

ers on the project to interpret your data, not raw numbers. You need excellent interpreters — interviewers, strategic planners and/or researchers who really understand the creative research process, and who know how to decipher body language, tonality, and read between the lines of respondent answers. Be sure your interviewer is tuned into, understands and appreciates good creative work, and is aware of the nuances of answers and their underlying meaning. A good interviewer starts weaving the threads of an advertising story together within the first few interviews. A qualitative study is, in effect, more art than craft, and the most important thing in communication is to hear what isn't being said.

5. Be sure the agency puts extra effort into the details of the test storyboards, ads, etc. Although a good interviewer will warn respondents upfront about the rough quality of "cartoon-like" artwork, scrap art, amateur voiceovers, etc., and will immediately steer respondents away

from irrelevant comments, respondents insist on interpreting your rough ads literally. It is difficult for them to simply overlook details which may seem irrelevant to the art director preparing the ad, and minor infractions make a big impact. A re-

spondent critique of factors which are not intended to play a part in the final execution drains energy from the rest of the interview, and may give backroom viewers a skewed view of the results. For example, I often show storyboards which feature frame af-

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ter frame of only Caucasian people — unusual since many produced ads end up with ethnic diversity. But respondents notice and comment negatively about this detail, negativity which may spill over into their feelings about the product and advertiser. In another example (an ad communication check among serious bicyclists), we showed a print ad for a bicycle wheel. The scrap art featured pictures (chosen to create a mood, not reality) which, upon close inspection, as sports enthusiasts are wont to do, actually portrayed a totally different

type of wheel from the advertised product — an oversight which detracted from the credibility of the advertisers.

6. Respondents will inevitably say they dislike comparative, negative ads. Although consumers have no qualms about badmouthing advertising themselves, they say they don't want to hear it from you. *USA Today's* Adtrack reports that the negative long-distance company ads (each comparing itself to others and saying it has lower prices) are the least-liked ads in television. But these negative ads do provoke emotional responses, recall and controversy, and are overwhelmingly used in political campaigns, so what is really going on? This is an issue which requires delicate exploration on the part of the interviewer, in order to understand whether the respondent is touting the party line on negativity in advertising or is truly offended by the ad.

7. Don't let respondents choose the "favorite" execution or cam-

paign for you. Isn't that the purpose of consumer research, you might ask. Showing several advertising options and asking respondents which they like best may seem the most democratic method, but it places them in an unnatural role which has little meaning. Musicians don't lead the orchestra, the conductor does. A respondent has no idea of the many factors involved in choosing the appropriate ad. Yes, their reactions are crucial, but analysis of the "winner" is the researcher's job. Backroom viewers will inevitably tally respondent preferences and favorites, and choose the winner by the numbers, which negates the value of qualitative research. Once these tallies exist, it is nearly impossible to produce any campaign with fewer favorite votes than another, no matter how qualitatively superior it is.

8. "Believability" is a worthless measurement. In almost every advertising research project, someone will suggest (or include in a preliminary

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discussion guide) the believability question: "Is this ad (or what they're saying) believable, or not?" This question serves no purpose. It implies that reality is inherently better than fantasy in the advertising realm, and who decided that? Are the Budweiser frogs or Nissan's Barbie and Ken "believable?" Do you care? What matters is that the advertising touches the hearts of consumers, not their reality checker.

9. After emotional issues, the most important information you'll hear is about the company's image. Advertising is about creating an image for a product, a product made by a company. Asking respondents what sort of image or impression they get about the company from the ad tells you a lot about the perceptions that will linger over time, and at the cash register. Ideally, and depending on the advertising strategy, you will hear comments such as "They care about me," "They're innovative," "They're a company you can trust," etc. Isn't

that what it's all about?

10. Good creative work deserves the best research it can get. Remember that creative work is delicate and must be treated with both kid gloves and the respect it deserves. With the proper treatment,

by someone familiar with the creative research process, a good ad's hidden wonders and strengths will come to the surface, because that researcher knows how to shine the cold light of consumer reality in the right direction. □

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Measured response

continued from p. 18

- Unaided and aided brand awareness. The creation and maintenance of brand awareness is one of the most fundamental (and most valuable) goals of advertising. Advertising can be effective if it does nothing more than create brand awareness.
- Unaided and aided advertising awareness. These tend to be diagnostic measures. These measures help indicate if the changes in brand aware-

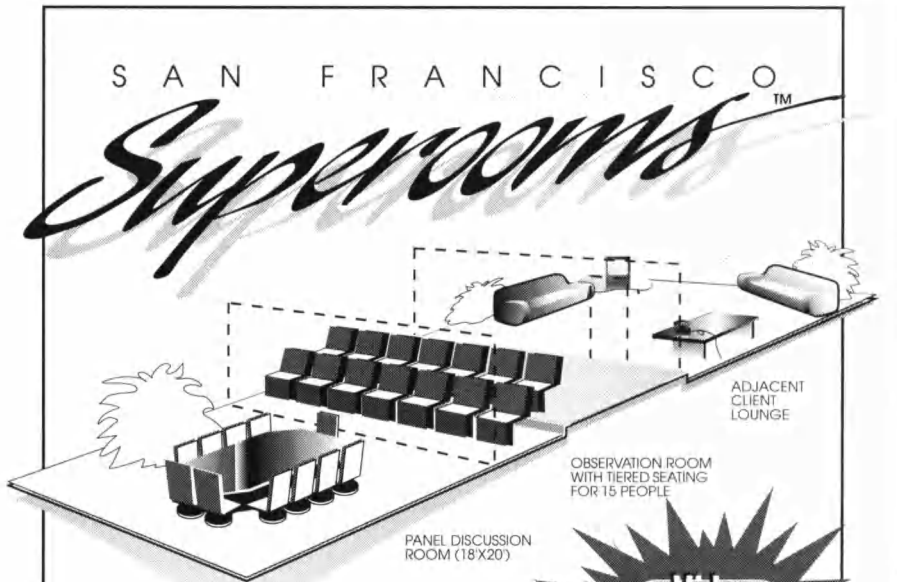
ness or market share are related to the advertising itself. For example, if brand awareness is trending up over time, and advertising awareness is trending up, then we can reasonably assume that the advertising is having positive effects. But, if brand awareness is rising while advertising awareness is declining, then one would have reason to suspect that the advertising might not be responsible for the improving brand awareness.

- Advertising message recall. What messages and ideas from the adver-

tising do consumers remember? Do the remembered messages correspond to the advertising messages that the advertising was intended to communicate? Advertising message recall is measured by an open-ended question, to which respondents give unaided, spontaneous answers. This question helps determine if the intended messages are getting through to consumers. Advertising message recall also provides an indication of consumer memory distortion and learning effects over time. That is, once a commercial starts running, consumers do not remember everything in it equally. Some elements stick in the memories of consumers, and other elements fade away. Knowing the elements that have the highest memory value is of great benefit in improving future creative executions.

- Brand image. Advertising can shape and magnify a brand image over time. This is one of the most important strategic benefits of advertising. However, if you include brand image rating questions in the tracking questionnaire, don't expect to see any meaningful changes in a brand's image in the short run. Typically, it takes a minimum of one to two years of consistent advertising to cause a measurable change in brand image. The full effects of brand-image shifts play out over 10- to 50-year time intervals (sufficient time to let the stubborn and the rigid of mind pass away).

- Brand trial and usage. Trial of the subject brand and major competitive brands is a useful measure to track. Usage of the subject brand and the major competitive brands (i.e., how often, what size package, etc.) allows market share estimates to be calculated and tracked over time. Moreover, both trial and usage are valuable analytic variables. The survey results can be cross-tabulated by triers versus non-triers, users versus non-users, and light users versus heavy users. Including a measure of volumetric usage of the target brand is always important, because one of the possible effects of the advertising is an increase in frequency of brand purchase (i.e., an increase in the volume or amount of the brand consumed).



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• **Demographics.** Key demographics such as geography, age, sex, education and income should always be included. These variables are extremely valuable in analyzing tracking survey results and in defining the optimal target market for a brand.

The following measurements might also be considered for inclusion in an advertising tracking questionnaire. Typically, these are not must-have questions, but at times one of these optional questions can be very useful.

• **Aided advertising message recall.** Sometimes researchers will include a list of all major copy points, and ask consumers who are aware of the advertising whether the advertising communicated each point. This can be an effective way to measure messages conveyed by the advertising. One must be careful in how this question is posed, and how it is interpreted, because consumers have a tendency to claim that they recall all aided messages — even messages not actually in the advertising itself.

• **Aided commercial recall.** Typically, a campaign consists of several commercials. By reading a brief description of each commercial to respondents, the level of recall for each commercial can be determined. This is not an exact or perfect measure, but it can provide a first approximation of the impact of each commercial. Once it has been confirmed that respondents have seen a specific commercial, it is then possible to ask follow-up questions, such as a) the number of times each commercial was viewed, b) whether respondents remembered the name of the brand advertised in each commercial, and c) some type of simple rating of each commercial. Again, these are not perfect measures, but each can tell us a little about the commercial's on-air performance.

• **Promotion awareness and usage.** If promotion plays a significant role in the marketing plan, then it could be useful to track awareness of a brand's various promotions and consumer participation in those promotions. These questions can be unaided and/or aided, and questions about competitive promotions can be included as well.

• **Market segment characteristics.** These are typically questions to iden-

tify important market segments, to refine one's ability to analyze the tracking survey data. For example, questions about price sensitivity, cents-off coupon usage, preference for shopping at certain types of retail outlets,

propensity to participate in promotions, etc. can be useful cross-tabulation variables. These questions might reveal that the advertising is doing particularly well among certain groups of consumers, but is not reaching other

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segments of the consumer market.

• **Media habits.** These questions can be simple and few, or complicated and many. Generally, it is best to limit media questions to a few important measures, such as the amount of time the respondent spends "consuming" various types of media, or types of programming watched most often. The media questions can be analytic variables and can help refine media strategies. Since so many good syndicated sources of media data are available, it usual doesn't "pay" to add a lot of media questions to an advertising tracking study.

• **Lifestyle/psychographics.** These types of attributes or statements can allow us to analyze tracking data by lifestyle or psychological segments. Typi-

cally, lifestyle and/or psychographic measures are of limited value in an advertising tracking study. First, the correlation between lifestyle/psychographic market segments and marketing-relevant consumer behavior tends to be low (i.e., these measures don't work very well). Second, time limitations on questionnaire length tend to preclude the inclusion of sufficient lifestyle/psychographic measurements to provide statistically reliable results.

Sample definition

Once you have decided what questions to ask in your tracking study, two critical decisions remain to be resolved: sample definition and continuous versus pulsed interviewing.

It is wise to define your sample broadly, to make it as inclusive as possible. For example, even if your target market were defined as consumers 25 to 34 years old, it would still make sense to track all consumers 18 to 64 (or older) in age. The broader definition of the sample is a safety net, because the demographics of a market can change over time. If you define your sample too nar-

rowly, you run the risk of the sample becoming obsolete. Likewise, define the product category you are tracking as broadly as possible. Also, always set quotas for gender, so that you do not under-represent men.

Continuous interviewing offers a number of advantages over pulsed. Continuous provides a complete record of consumer measurements over time — with no gaps or missing time periods in the data. The quality of interviewing tends to be higher with continuous surveys, since the same interviewers work on the project day after day. Continuous tracking smoothes out the effects of short-term disturbances such as adverse publicity, new product introductions, bad weather, etc., whereas pulsed tracking can be biased strongly if some negative event occurs just as a wave of interviewing is conducted. Continuous tracking is a better monitor of competitive information, since the interviewing is ongoing and not biased to the media schedule of one brand (as tends to happen in pulsed interviewing).

Continuous tracking data can be analyzed in relation to other continuous

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data (sales, advertising expenditures, market share, etc.), normative standards can be set, and predictive mathematical models can be derived. That is, it is possible over time to develop a model for a specific brand that explains the relationship among media expenditures, tracking variables and market share (given sufficient time and data). Such an understanding is the Golden Fleece that marketing executives seek.

Pulsed tracking is not without some advantages. Pulsed tracking is less expensive than continuous tracking. Pulsed interviewing can be concentrated into a short time interval to provide highly precise before/after measurements for specific flights of advertising, and the waves of interviewing can be precisely timed to coincide with media schedules.

Regardless of whether you choose continuous or pulsed interviewing, several guidelines should be followed to ensure that the tracking data is comparable from time period to time period:

- Maintain constant methods. The questionnaire, the sample definition, the training of interviewers, the editing, coding and tabulation procedures must all remain constant from time period to time period. Any change in methods is very likely to cause perturbations in the survey results and destroy the comparability of data between different time periods.

- Stay with one research company. Once you have found a research company with a) financial stability and b) good quality-control systems to do your advertising tracking, stay with that company. If you change research companies every year or two, the tracking data will not be comparable across time. Small differences in methods (i.e., interviewing training, callback policies, editing and coding conventions, etc.) from research company to research company will almost always destroy data comparability.

- Stick with advertising tracking. The tracking research will grow in value from year to year, as you learn more and more about the long-term effects of your advertising. You must stick with your tracking measurements year after year to fully realize

the maximum strategy insights into your brand, your market and your advertising.

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Saab

continued from p. 11

we can enhance the execution. We like to use it as phase one to make sure we go into the quantitative phase from a position of strength."

Mini-magazine

The ads that were tested focused on the Saab 900 five-door turbo model. "Visually, the print ads were designed to replicate the look and feel of the television campaign, to be very colorful and whimsical in their approach," Gould says. "We also

wanted to drive home some performance messages and talk in greater depth about some of the technical specifications of the car. This particular ad was trying to combine the fact that a five-door turbo was fun to drive, but also had a roomy interior and a large cargo area." The ads invite readers to call a toll-free number for more information about the Saab line.

For a basic ENVISION print ad test, a respondent sits at a computer to view a 15- to 20-page mini-magazine featuring ads and editorial using the eye tracking technology. A technician is there to help them if they have questions. This is followed by a series of closed- and open-ended questions, administered by a moderator, covering unaided recall and a variety of other topics.

"We create mini magazines or, in the case of packaging, realistic store shelves or POS displays so that the designs can be looked at in context. That's key because you end up with a rich set of responses during interviews," says Keith Sherman, presi-

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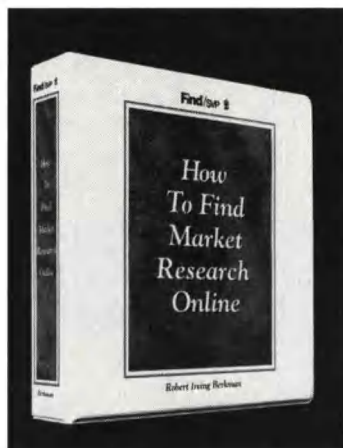
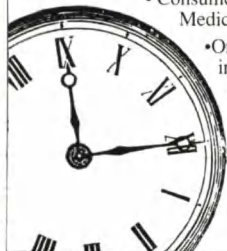
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For the eye tracking portion of the research, the respondent dons special glasses and places his or her chin on a chin rest to standardize the viewing distance and assure measurement accuracy. An invisible beam of light is directed at the respondent's eye. A camera picks up the beam of light and the technology pinpoints where the respondent's focal point is on the material being viewed. Back room observers can watch a monitor to see where the respondent's eyes go as the material is viewed.

Eye tracking is objective

The value of eye tracking is that it's objective, Sherman says. People don't always know or can't remember what they've looked at. But eye tracking can show you where they've looked. "It gives us a measure of which elements attract attention quickly, and it gives us a measure of readership and what we call the scan path or viewing pattern, the order people view things.

"It lets us find out if people spend too much time on something that's not a high priority and if they're missing key elements. If a person doesn't recall a key tagline, eye tracking tells us if they read it or not. If they don't read it, then you need to modify the graphic to attract their attention. If they do read it and don't recall it, the content needs to be revised."

"Eye tracking allowed us to know if they had actually found the 800 number and the Web address," Gould says. "We could see the parts of the ads they consumed, if they read the body copy and how long they spent reading it. From a back room perspective, there would have been no other way for us to know that."

Unnatural environment

Gould says there were concerns that the eye tracking environment was unnatural. "People had some questions about how legitimate the results were going to be. They felt it wasn't a true representation of the actual magazine reading environment. Unlike TV ad testing, where you can have people sitting in a comfortable chair, somewhat simulating the envi-

ronment they watch in, it's harder to achieve that in the magazine testing," Gould says.

"When we conceive a research environment," Sherman says, "we simulate the natural features that are criti-

cal — the ones that enable us to see and hear how an ad will perform in the real world. That's why, for example, we tested the Saab ads in a mini-version of *Sunset* magazine, surrounded by competitive ads and rel-

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evant editorial content. If we're testing an ad for cake mix we place it in a magazine like *Good Housekeeping*. If we're testing an ad for financial services we place it in *Time* or *Business Week*. Other natural features that are critical to the process include letting respondents look at the mini-magazine at their own pace and re-exposing them to the ad a second and sometimes a third time."

Despite any reservations the agency had going into the research, it recognized the value of the findings and incorporated some of them into the ad. "They've held on to the integrity of the ad but they've made it easier for people to read it all the way through. They've given people who were intrigued about the car a better sense of what the car is like," Treistman says.

For example, the body copy was enlarged and boldfaced to make it more readable. And the toll-free number, which previously was part of the body copy, was placed on a separate line. The photo of the car was enlarged after some respondents said that it seemed too small (especially when the ad men-

tioned how spacious the car was).

While some respondents felt that the distinctive font used for the headline looked like a child's writing, it worked well with the colorful graphic. "We were not deterred by the people who said it was childlike because we knew it was working," Treistman says. "We learned that the font was a very effective tool to reinforce some of the imagery Saab was trying to get across. It was also very readable, very attention-getting and involving. It had a freestyle feeling that was very relevant to the non-conventional personality that Saab has created."

Test fractionals

Saab also wanted to gauge the effectiveness of some fractional ads it was running in conjunction with the full-page ads. The fractionals, which Saab earned due to a high volume of advertising, contained information on how people could receive an "excursion kit" which contained more information about Saab's line of cars. "We wanted to see if that was the best use of our advertising credits or if we should be using them for other purposes, for example, trying to develop some joint promotional activities with the magazines," Gould says.

Though the research found that respondents didn't always connect the fractional ad with the full-page ad, Saab hasn't stopped using them. "But we did get some clues about how to better tie them with the full page ad, linking the ads with graphics and colors so people could more easily see the connection between the two," Gould says.

Team-building

If egos and territorial instincts allow, the ENVISION approach is designed to foster a team-building atmosphere. "There's a lot of ownership of the outcome because it's been compiled with people from different parts of the company in the same room. Everybody's there seeing it firsthand," Sherman says.

It's important to have representatives from many parts of the company, including marketing, advertising and brand managers, present during the testing, Treistman says. This not only

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increases ownership of the results but helps (at least ostensibly) the decision making process. "It's our preference to have the creative people from the agency there because the modifications that are made to the packaging or the advertising should be made at the behest of the agency people," she says.

"In a typical focus group, you'd end up going back to the client's office, having a discussion and the client saying, 'We aren't satisfied with main idea communication.' The agency is stuck trying to defend its position. But if we're in the field, we're all there building a more successful ad in the same time period," Sherman says.

Treistman says the service is also designed to save time and effort, commodities much prized in the I-need-it-yesterday world of research. "It's not a case of coming to the end of your one-on-ones or focus groups and waiting for the report and then waiting for a new version of the creative. You can walk out the door with the new version in your hand." □

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RV

continued from p. 13

the Eisner groups told their fellow campers that they had rented their RVs and were trying them out to see if they enjoyed the RV lifestyle. Those turned out to be the magic words. "That was a great opener to get people talking because then they wanted to tell you all about what it was like, how wonderful it is, how much they enjoy it and why they started. They almost became salespeople themselves," Bruce says.

"Sometimes you're doing research and trying to get people to talk is like pulling teeth. This was just the opposite. Getting to know them turned out to be amazingly easy. You drive in and almost immediately people would come over and ask if they could help or if you needed to know where the nearest 7-11 was."

RVs give fulfillment

The Eisner teams discovered that owning an RV gives people the kinds of fulfillment that they don't regularly get in their day-to-day lives. The fulfillment comes in four areas:

1. It provides a chance for a real connection with the family. "For them, the family RV vacation was

about small things, building a fire together, going fishing. They looked down on the family vacation to Disney World, because that's not being with your children. That's like giving your children over to the Disney process. When they went away with the family they wanted to *be with the family.*," Bruce says.



Talking with RVers around the country gave the Eisner team valuable information that helped shape the content of the print and TV campaigns.

2. It's also about getting back — but not all the way back — to nature. The RV experience brings people close to mountains, woods and water but also lets them sleep and eat in comfort.

3. Taking a vacation in your RV also lets people control their lives — at least while they're on the road. "You can decide to stay another night at the campground or you can go on. You can make decisions about what you want to do and when you want to do it," Bruce says.

4. Hitting the road in an RV also



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fosters a sense of acceptance. "Everyone shares in this love of the RV experience. You drive in and you are automatically accepted as part of the group. It's like democracy. You can have a pop-up camper next to a Winnebago. The people are helpful, kids play with each other. There are people who meet every year at the same campground to see each other again."

Lasting friendships

The resulting television and print ads heavily emphasize the quality-of-life aspects of RV ownership. Taglines for the print ads include "Imagine staying in a town where the biggest crime committed was that steak you burned last night" and "Funny how you never hear about the lasting friendships people made at the Motor Lodge." Accompanying visuals show a variety of RVs ensconced in idyllic settings from a mountain lake to a shoreline at sunset. The TV ads, including spots titled "Seashore," "Campground" and "Lake" echo the print ads.

The agency also conducted focus groups with RVers, non-RVers and people who had visited a dealer in the past two years but hadn't bought an RV. "That was to supplement and confirm what we were learning in the 'real world,' if you will. I often find that focus groups are a way to confirm what you think you're learning when you go out in observation mode," Bruce says.

"We did take the print ads back in to check on visuals. We were pretty sure our concepts were right. We weren't testing for concepts so much as testing visuals, testing language, just to be sure it was ringing true in the way that it looked and sounded."

Internal debate

The agency will measure the effect of the ads through pre- and post-wave testing of agreement to a variety of statements related to RVs. "We're not expecting the advertising to sell RVs," Bruce says. "What it will do is change perceptions of who RVs are for. We'll measure agreement with

statements over time about who RVs are for and what RVing is all about."

Getting agreement to invest a great deal of money in an ad campaign that focuses more on the RV lifestyle than the vehicles themselves was no easy task. "When we presented the idea we said we're not selling recreation vehicles, or talking about how big they are, how many beds they have. We're selling the experience of it. The RV is a means to an end, not an end in itself," Bruce says.

"We went through a lot of internal debate," LaBella says, "about whether it was the proper role of the various industry associations to form a coalition and do this campaign. Some companies would rather spend their money promoting their name rather than contributing to an industry fund. In the end, we knew that we're much better off uniting to compete against other industries that are after people's discretionary time and money." □

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Consumer Opinion Services
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Just The Facts, Inc.
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Research Connections, Inc.
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James Spanier Associates

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Outsmart Marketing

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Review

Listing Additions

On p. 71 of the 1996 Mall Research Facilities Directory, the listing for Northeast Data's mall facility should read (corrected text shown in bold):

Northeast Data
Liberty Tree Mall
100 Independence Way
Danvers, MA 01923
Ph. 508-777-8433
Fax 508-777-8443

On p. 107 of the 1997 Focus Group Facilities Directory (which appeared in the December 1996 issue) the listing for Central Research & Consulting (which was incorrectly listed as Topeko Central Research & Consulting) should be listed under a Topeka subheading.

Please add the following firms to the 1997 Focus Group Facilities Directory:

New England Marketing Research
200 Connecticut Ave., 4th fl.
Norwalk, CT 06854
Ph. 203-855-5500
Fax 203-855-5501
Eric Souza, Executive V.P.
Location: Office building
CR, LR, OR, 1-1, 1-OR, VE
1) 20x20 Obs. Rm. Seats 20
2) 20x20 Obs. Rm. Seats 20
3) 15x15 Obs. Rm. Seats 12
4) 15x15 Obs. Rm. Seats 12 (living room style)

Miami Market Research, Inc.
6840 S.W. 40 St., Ste. 201A
Miami, FL 33155
Ph. 305-666-7010
Fax 305-666-7960
E-mail: Miamktrsch@aol.com
Luis Padron, President
Location: Shopping mall
CR, OR, 1-1, 1-10R, TK, VE
1) 20x14
2) 14x12

Quality Controlled Services
34119 W. 12 Mile Rd., Ste. 360
Farmington Hills, MI 48331
Ph. 810-553-4714
Fax 810-553-7528
E-mail: Dflock@maritz.com
Dianne Flock, Branch Manager
Location: Office building
CR, OR, VE, VC
1) 23x16 Obs. Rm. Seats 15

KS&R's INSITE
5792 Wide Waters Pkwy.
Syracuse, NY 13214
Ph. 800-645-5469
Fax 315-471-0115
E-mail: KSR@localnet.com
http://www.ksrinc.com
Lynnette Van Dyke, Director
Location: Office building
CR, OR, 1-1, VE
1) 15x18 Obs. Rm. Seats 14

Accurate Focus, Inc.
850 Waterman Ave.
East Providence, RI 02914
Ph. 401-435-3335
Fax 401-435-3321
Stephen Hadens, President
Location: Office building
CR, OR, 1-1, 1-10R, TK, VE
1) 23x15 Obs. Rm. Seats 20

Market Development Associates, Inc.
5050 Poplar Ave., Ste. 920
Memphis, TN 38157
Ph. 901-682-1011
Fax 901-684-5352
E-mail: mktdevlp@aol.com
Resa McVay, Dir. of Field Services
Location: Office building
CR, 1-1, VE, VC
1) 21x15 Obs. Rm. Seats 10

Please add the following firms to the 1997 Mystery Shopping Directory:

Arizona Market Research Services
10220 N. 31st Ave., Ste. 122
Phoenix, AZ 85051
Ph. 602-944-8001
Fax 602-944-0130
Ruth Nelson, President
Regionally - Data Collection
B, E, F, R, RT, S

Michael Pettengill
3365 Ridge View Dr.
El Dorado Hills, CA 95762
Ph. 916-933-3666
Fax 800-251-3666
Michael Pettengill
Nationally - Full Service
B, F, R, RT, S

National Shopping Service
5777 W. Century Blvd., Ste. 775
Los Angeles, CA 90045
Ph. 310-645-1927
Fax 310-645-1922
E-mail: info@nssmysteryshoppers.com
http://www.nssmysteryshoppers.com
Susan K. Meyer, Vice President of Ops.
Nationally - Full Service
B, E, F, R, RT, S

Brewer Research
1421 Delaware Dr.
Colorado Springs, CO 80909
Ph. 719-597-9869
Fax 719-597-9869
Esther Brewer, Field Supervisor
Locally - Data Collection/Field Svc.
B, E, F, R, RT, S

Colorado Market Research Services
2149 South Grape St.
Denver, CO 80231
Ph. 303-758-6424
Fax 303-756-6467
Ruth Nelson, President
Regionally - Data Collection
B, E, F, R, RT, S

Mystery Guest, Inc.
668 N. Orlando Ave., Ste. 107
Maitland, FL 32751
Ph. 407-647-3333
Fax 407-647-3016
Thor Falk, Vice President
Nationally - Full Service
F, R, RT, S

SPAR Inc.
14 Industrial Ave.
Mahwah, NJ 07430
Ph. 201-934-0600
Fax 201-934-3935
Tracy H. Bacon, Vice President
Nationally - Full Service
E, F, R, RT

Oklahoma City Research
Quail Springs, 2501 W. Memorial Dr.
Oklahoma City, OK 73134
Ph. 405-752-4710
Fax 405-752-2344
Ruth Nelson, President
Regionally - Data Collection
B, E, F, R, RT, S

Utah Market Research Services
Crossroads Plaza - 50 S. Main St.
Salt Lake City, UT 84144
Ph. 801-363-8726
Fax 801-321-4904
Ruth Nelson, President
Regionally - Data Collection
B, E, F, R, RT, S

Stewart International Associates
177 E. Silver Spring Dr.
Milwaukee, WI 53217
Ph. 414-964-8876
William W. Redemann, President
Nationally - Full Service
B, F, R, S

Please add the following firms to the 1997 Directory of Data Processing/Statistical Analysis:

Davis Coding Inc.
625 Broadway
New York, NY 10012
Ph. 212-674-2230
Fax 212-674-2099
E-mail: MrCoding@aol.com
Steve Davis, President
CD, DE

Quest Research
2900 North Loop West, 10th fl.
Houston, TX 77092
Ph. 713-956-6569
Fax 713-956-2593
E-mail: 74454.2467@compuserve.com or
qba@flash.net
Mary Jo Martin, Vice President
CD, DE, DT, SA



Editor's note: This is your space to comment on the articles that appear in QMRR. When you write, please include your name, job title, company or organization name, address and phone number. Letters may be edited for clarity or space. Send letters to: Joseph Rydholm, QMRR, P.O. Box 23536, Minneapolis, Minn., 55423. Fax them to 612-854-8191 or E-mail them to quirk19@mail.idt.net.

Market research or sales incentive program? Reading the article in the January issue about mystery shopping for digital pianos piqued my personal perception analyzer.

Professional market research people are careful to ensure that they distinguish between research and sales lead generation. This article discusses what appears to be an effort to get salespeople to feature a particular brand, masquerading as market research. Surely mystery shopping has its place in the arsenal of market research, particularly for customer satisfaction data. But on-the-spot rewards for steering customers to the client's brand first is an abuse.

Mystery shop, if you need to. Keep track of the brands and the order in which they are introduced. Then, analyze the data. If it can be shown that being introduced first is correlated with sales success, then implement a sales incentive program. But on-the-spot payments for being first is inappropriate. Just as in the general field of customer satisfaction research, one sample doesn't make a trend.

Many clients run off and use data from exceedingly small samples to reward or punish people. Let us not encourage them.

Joel Raphael
View Power, Inc.
New York City

The article on student research teams in the January issue finds an especially appreciative reader. A dozen years ago, after 20 years in advertising, I was asked to start an advertising curriculum at the University of Nevada in Reno.

I built it around engaging students and real clients, using qualitative consumer in-depth interviewing, both in-person and telephone. Each student was expected to be a part of a team doing market research studies in the third year, and a full-scale advertising campaign in the fourth year. Soon the program was expanded to provide graduate level classes as well.

Student teams were encouraged to make a choice among potential clients committed and ready to work with a student team.

Clients have ranged from local stores to national accounts like the California Artichoke Advisory Board. From a west coast bottled water company to the National Assistance League. From a 17-member bank system to the specialty shopping center run by the local Junior League as a fund-raiser. From the Northern Nevada Florist's Association to *Johnny's Selected* national seed cata-

log. And from a California winery to the National Arboretum in Washington, D.C.

One student created the concept for overnight FedEx delivery of fresh-cut flowers direct from grower to consumer as 1-800 Flowers. One team had the Reno Silver Sox ball team as a client.

The Reno Ad Club has been an active supporter since Day 1. The club supplies a mentor for the members of each team. And it makes a generous donation each year to fund the program, even sending a team to Washington, D.C., to repeat their presentation, first to the key members of the Secretary of Agriculture's staff, then to The Friends of the National Arboretum in appreciation for their enthusiastic support of the team assignment.

Dr. Joseph E. Howland
emeritus professor of journalism
University of Nevada
Reno, Nev.

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Trade Talk

continued from p. 66

In its brief existence, CMOR has focused on combating state and federal legislation that threatens to directly or indirectly restrict marketing or public opinion research. And now it's also trying to address the problem of declining respondent cooperation.

"We've done a lot in the legislative area and we're very proud of the successes we've had in affecting legislation that, in most cases, if it were passed collectively could have put us out of business. But now we have an even bigger challenge: to turn around the attitudes that people have about the interviewing process," Wilson says.

The impact of telemarketer sugging (shorthand for "selling under the guise of research," in which the telemarketer couches the incipient sales pitch in words like "I'm calling from Company X and we're conducting a survey of homeowners today...") can't be underestimated. "Many consumers think that as soon as they get a phone call that there's a sales pitch involved," Mock says. "And their quick refusal doesn't give us enough time to get enough words in to assure them that we are indeed conducting a study."

(Fear of quick refusals must account for the rapid-fire delivery used by some of the interviewers who've called my house lately. As soon as I answer the phone they sputter half-intelligible syllables that seem to include their name, the research company they work for and the purpose of the call. I realize they're trying to get out as much of their introduction as they can before I hang up or refuse but their anxious tone only adds to the feeling that I'm about to hear a pitch for beautiful, durable aluminum siding instead of a series of screening questions.)

Add to the mix answering machines, lengthy interviews, and the generally busier lifestyles so many of us have and you have a bumpy road in between the researcher and a completed interview.

"We need to promote among users and providers the idea of shortening interviews, focusing on questions that are really key to the decision process, and keeping the background questions to a minimum. Because we not only turn the consumer off for that interview but we turn them off for future research," Mock says.

"There's some concern in the industry that if you step away from a very structured interview, you may damage the research results. Others feel that interviewers can't be trained to be flexible where it's OK to be flexible but not to be flexible where they really need to be. If we hire intelligent interviewers and train them well, they can make the judgment about where a little flexibility with the respondents can keep them hanging in there. I think we can do it without jeopardizing the comparability of one interview to another or one study to another if we do the right kind of training."

In tandem with those efforts, Mock says industry-wide guidelines and principles should be applied to every research project, and those guidelines should be communicated to the general public. "We can tell consumers, 'Good

research looks like this, and you should expect that if you get called for a survey, the researcher will stay within these parameters and here's a number to call if you have problems.'"

Show them the money

Of course, all these efforts require funding. CMOR is currently funded through contributions from research users and providers. While the Port Washington, N.Y., organization has done outstanding work on its current budget, it would be nice to have more. "What CMOR can do today with a limited budget is limited work. It's good work but if we dramatically increase the funding, perhaps five-fold, from \$600,000 to \$3 million, a significantly larger amount of work can be done," Mock says.

"We've done a lot to understand what our problems are," Wilson says, "and we have done some things that are helping but in order to really educate the public and start turning attitudes around we need increased funding. There's nothing more important to the future of the research industry than the attention we give to our primary resource, our respondents."

One possible idea is a tiny tax on each interview, proceeds of which would go toward industry promotion and education efforts. Such a tax would more than pay for itself over time, Mock believes. Greater acceptance of research would enlarge the pool of willing respondents, improving the representativity of research. With more people willing to participate, fewer calls would have to be made to reach qualified respondents.

"We need to get consumers to the point where they understand the importance of research," Mock says, "where they've participated in studies before and they're not left with the feeling of being beaten up. It's short, it's fun, they'll do it again."

"A very optimistic vision, if you want to get a little crazy about it, is that consumers will recognize the importance of research and hold it at a high enough level and also have enough fun with the process that we could call and leave a message on the answering machine to call us back and they'd do it."

Wouldn't that be wonderful? □

(For more information, call CMOR at 516-928-6206 or CASRO at 516-928-6954.)

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Trade Talk

By Joseph Rydholm/QMRR editor

Can we meet these challenges?

Earlier this winter, the Council for Marketing and Opinion Research (CMOR) and the Council of American Survey Research Organizations (CASRO) sponsored a conference on the issues facing the marketing research industry. In conjunction with the conference I chatted with two of the speakers, Larry Mock, manager, market research worldwide, Procter & Gamble, and William "Jay" Wilson, chairman/CEO of Roper Starch Worldwide Inc., Mamaroneck, N.Y., and CMOR board chairman.

Mock began by outlining challenges facing the marketing research industry:

- Globalization. If companies hope to turn their brands

into global entities, they must develop complex strategies to research global consumers. "Researchers now not only have to understand consumers in a particular geography but understand similarities and differences of consumers across geographies. That calls for designing standardized tools so that results can be compared across the geographies. It also places a lot of emphasis on improving the efficiency of conducting global research because in many cases that can be a cumbersome process," Mock says.

• Interactive research: "The interactive world is adding new dimensions to research. It offers opportunities and also challenges. While we're just at the frontier of some of the advantages that the Internet can bring us, we're going to have to work our way through the complexities. The research companies are looking at ways to offer research users like ourselves more and better services that didn't exist yesterday."

• The proliferation of data: "The amount of data is increasing exponentially, and we're going to get lost in it if we don't develop ways to access it, store it, deliver it, analyze it, and most important of all to integrate it," Mock says.

Fourth hurdle

Each of these is a pressing matter, but they won't matter at all if the industry doesn't have any luck clearing the fourth hurdle: declining respondent participation rates.

"The basic value and integrity of what we do is very much a function of our ability to satisfy our respondent customers — I tend to look at them as customers. We have a lot to do as an industry to make them happy about the research process and more willing to be interviewed," Wilson says.

Farcus

by David Waisglass
Gordon Coulthart



"Okay, okay ... but it's my turn next!"

continued on p. 65

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