

Quirk's

March 1998

MARKETING RESEARCH

Practical applications in marketing research

Review

It's about time

Research leads Nebraska health network to focus on speed of service in its ads

Advertising Research Issue

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INTRODUCTION TO MARKETING RESEARCH

Jan. 12 - 14, 1998 San Francisco
Feb. 9 - 11, 1998 Dallas
March 23 - 25, 1998 Cincinnati
June 15 - 17, 1998 Chicago
July 27 - 29, 1998 San Francisco
Oct. 5 - 7, 1998 New York
Dec. 7 - 9, 1998 Cincinnati

DESIGNING EFFECTIVE QUESTIONNAIRES

March 23 - 25, 1998 New York
June 15 - 17, 1998 Cincinnati
Aug. 3 - 5, 1998 Chicago
Nov. 9 - 11, 1998 San Francisco

APPLIED MARKETING RESEARCH

Feb. 2 - 4, 1998 San Francisco
June 1 - 3, 1998 Cincinnati
Oct. 12 - 14, 1998 Chicago

INTRODUCTION TO DATA ANALYSIS

Jan. 26 - 28, 1998 New York
March 30 - April 1, 1998 Chicago
June 15 - 17, 1998 Atlanta
Sept. 14 - 16, 1998 San Francisco
Nov. 16 - 18, 1998 Cincinnati

MARKETING APPLICATIONS OF MULTIVARIATE TECHNIQUES

April 20 - 22, 1998 Cincinnati
Aug. 31 - Sept. 2, 1998 New York
Dec. 7 - 9, 1998 San Francisco

NEW

CONDUCTING INTERNATIONAL RESEARCH

Oct. 19 - 21, 1998 Cincinnati

MEASURING & MANAGING CUSTOMER SATISFACTION & LOYALTY

Jan. 12 - 14, 1998 Dallas
April 20 - 22, 1998 Chicago
July 20 - 22, 1998 San Francisco
Sept. 14 - 16, 1998 Washington D.C.
Nov. 9 - 11, 1998 Cincinnati

NEW

DESIGNING & IMPLEMENTING EMPLOYEE SURVEYS

Sept. 14 - 16, 1998 New York

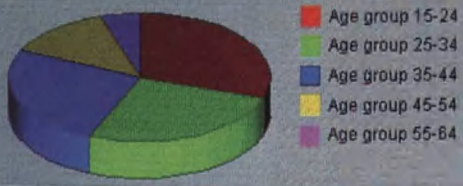
MODERATOR TRAINING FUNDAMENTALS

March 9 - 11, 1998 New York
May 4 - 6, 1998 Cincinnati
August 10 - 12, 1998 Chicago
Oct. 26 - 28, 1998 San Francisco

TRAINING FOR FOCUS GROUP MODERATING: APPLICATIONS & APPROACHES (4 DAY= \$1495)

Feb. 9 - 12, 1998 Atlanta
May 18 - 21, 1998 Cincinnati
August 24 - 27, 1998 Chicago
Nov. 16 - 19, 1998 San Francisco

Total		94.00	160.00	163.00
What type of restaurants do you eat at?	Chinese	3.00	4.00	6.00
	Fast food	13.00	19.00	19.00
	French	3.00	7.00	7.00
	Greek	10.00	13.00	23.00
	Indian	0.00	1.00	0.00
	Pizza	1.00	4.00	3.00
	Pub	9.00	8.00	15.00
	Other	8.00	9.00	22.00
What type of music do you like?	Soul/Blues	17.00	31.00	35.00
	Classical	2.00	11.00	15.00
	New Age/Ambient	9.00	27.00	30.00
	Jazz	1.00	2.00	6.00
	Pop/Chart	0.00	0.00	0.00



PULSAR 2. FLEXIBLE ENOUGH TO MAKE ANY KIND OF DATA FEEL AT HOME.

Some tabulation software is less than accommodating. Especially when you try to introduce external data.

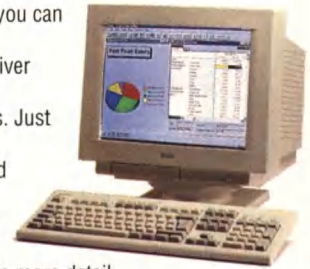
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C O N T E N T S



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March 1998

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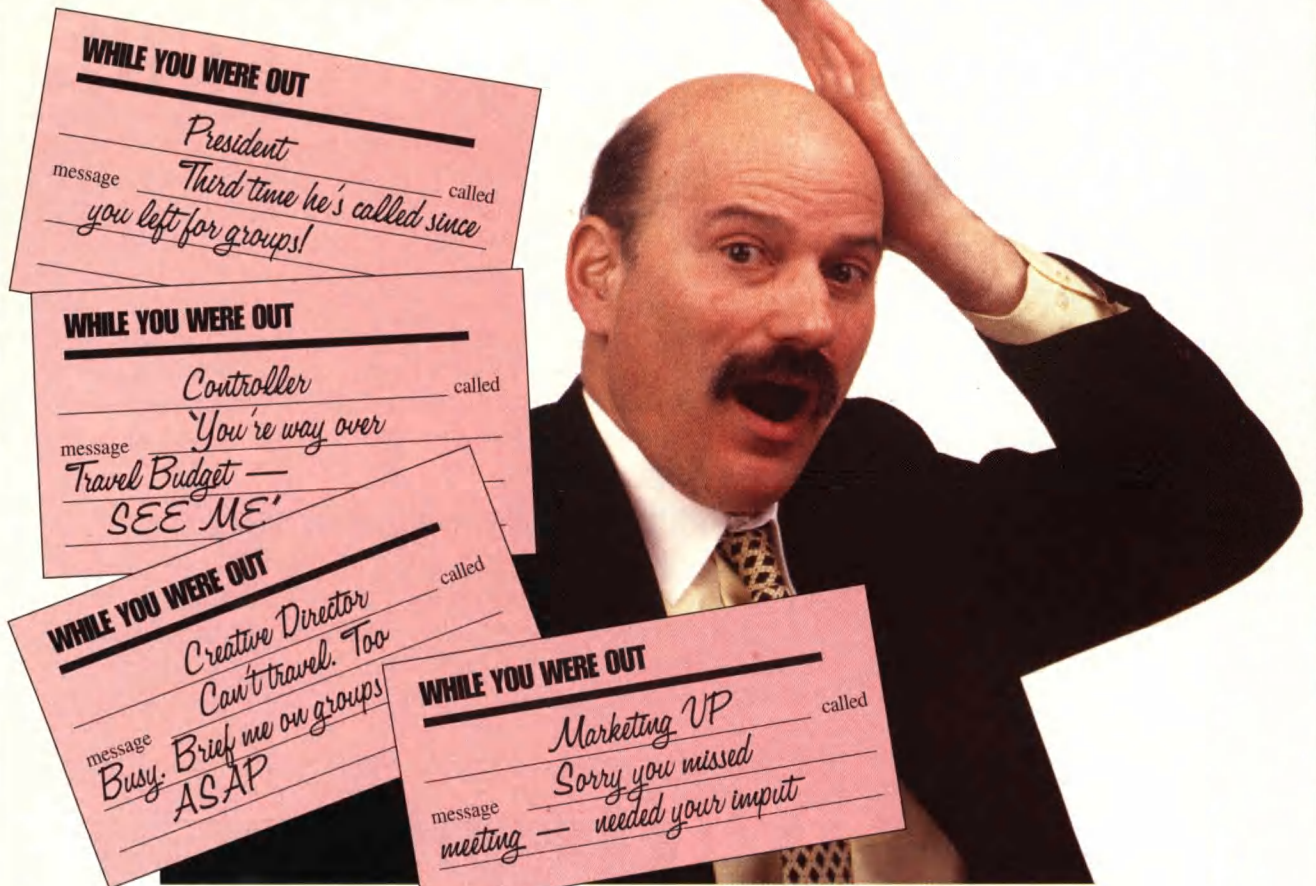
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Cincinnati

The Answer Group

Columbus, OH

Quality Controlled Services

Dallas

Quality Controlled Services
 Savitz Research Center

Denver

Information Research, Inc.
 Colorado Market Research
 Fieldwork Denver

Detroit

Quality Controlled Services

Ft. Lauderdale, FL

Plaza Research
 Wolf/Altschul/Callahan

Houston

C.G.S. Center for
 Qualitative Studies

Plaza Research

Jacksonville, FL

Irwin Research Services

Kansas City

Quality Controlled Services
 The Field House

Los Angeles

Adler-Weiner
 Research, Inc.
 National Qualitative
 Network (Quick Test)
 Trotta Associates

Los Angeles, Orange Cty.

Trotta Associates Irvine, CA
 Fieldwork, Inc.

Minneapolis

Orman Guidance Research

New Jersey

Schlesinger Associates, Inc.
 TAI-New Jersey, Inc.

New York City

Fieldwork East
 Cunningham Field Service

New York City

Murray Hill Center
 Wolf/Altschul/Callahan

New York City

Schlesinger Associates, Inc.

Philadelphia

Focus Pointe
 JIRA Marketing Research
 Quality Controlled Services

Phoenix

Fieldwork So. Mountain
 Fieldwork Scottsdale

Raleigh

L&E Research

Sacramento

Research Unlimited

San Francisco

Ecker & Associates
 Fleischman Field Research

San Jose

San Jose Focus

Seattle

Gilmore Research Group

St. Louis

Quality Controlled Services

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Superior Research
 TAI-Tampa, Inc.

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International

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Argentina

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Field Facts International

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Sponsorship spending will jump in '98

Corporate sponsorship spending by North American companies in 1998 will increase to \$6.8 billion, a 15 percent increase over 1997's \$5.9 billion,



according to the 14th annual projections of Chicago-based

IEG, Inc., a sponsorship industry research and consulting firm. The 1998 projected growth equals the 15 percent rise in sponsorship spending from 1995 to 1996. Growth was limited to 9 percent last year.

"The recovery is credited to significantly higher price tags for major sports properties, notably the Olympics, major sports leagues and auto racing. Previously undervalued properties are doing a better job of determining their market value and pricing themselves accordingly," says Lesa Ukman, president, IEG, Inc.

IEG projects for 1998 that worldwide spending will be \$17.35 billion, up 13 percent over 1997. In addition to North America's \$6.8 billion, European companies will spend \$5 billion, an 11 percent increase; \$3.3 billion will come from Pacific Rim companies, just a 6 percent growth in light of the region's economic woes; \$1.25 billion from Central and South American businesses, a 25 percent rise; and \$1 billion from firms in all other countries, also a 25 percent increase.

In North America, increased activity is expected from a number of categories that emerged as sponsors in 1997, including utilities, on-line services, entertainment companies such as cable channels and movie studios, destinations, hospitals and home and garden supplies. Companies and brands new to sponsorship in the past year (Best Buy Co.; Ikon Office

Solutions, Inc.; New Line Cinema Corp.; Old Navy Clothing Co.; Pepsid AC; PrimeCo Personal Communications LP; Service Merchandise Co.; and SunMaid Raisins) also should step up activity.

The number of U.S. companies spending more than \$10 million in sponsorships expanded from 52 to 58 in 1997. For the second consecutive

year, the top five sponsors remained the same: Philip Morris Companies (\$140 million to \$145 million), Anheuser-Busch Companies (\$130 million to \$135 million), The Coca-Cola Company (\$110 million to \$115 million), General Motors Corporation (\$90 million to \$95 million), and PepsiCo, Inc. (\$75 million to \$80 million). Seven companies joined the list for the first time, while NationsBank

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Billboards annoy but also serve need

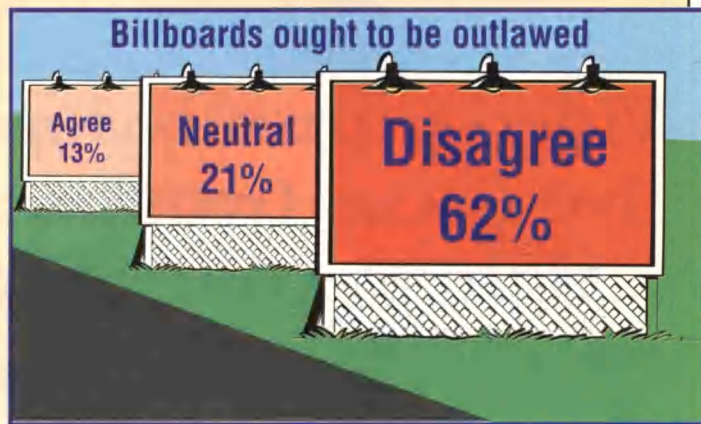
Touting everything from cigarettes to the nearest cheap motel, billboards can come with neon colors or 3-D effects, twinkling with glitter and lights. In some places, they're as prolific (and irrepressible) as ditch weeds, in others, nonexistent. They're everything from clever to annoying to downright dangerous. And 14 percent of Americans say they should be outlawed, while 62 percent disagree.

But despite the fact that most of Americans would not banish billboards, fully half of

Americans do not think billboards are entertaining, and 43 percent say they're not beautiful, either. Just 17 percent of travelers on American highways

and byways feel that the signs can be entertaining, and 27 percent think they can even be beautiful. Men are significantly more likely than women to say that billboards are definitely not beautiful (33 percent vs. 24 percent), while young adults age 18-24 are more apt than other age groups to say they are.

It could be the sheer utilitarian function of many billboards (how many miles to the nearest restaurant, hotel, gas station, etc.) that tempers Americans' distaste for roadside signs. Most favor a balance between wanton proliferation and strict regulation. When asked to respond to the statement, "Billboards can be useful, but should be strictly regulated," 52 percent agree, 20 percent disagree, and 26 percent are neutral. Men appear to be a little soft on the subject, with just one-fourth strongly agreeing with the notion of strict regulation (compared to 34 percent of women), while 17 percent feel strongly that billboards should not be regulated (compared to less than 10 percent of women). For more information call 800-446-1690 or visit the company's Web site at <http://www.maritz.com/apoll/>.



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J U S T A S K



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New product monitors patient satisfaction

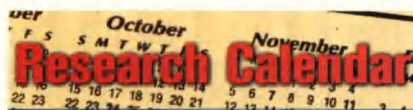
HealthLink America, Inc., Indianapolis, has created Rx: VS4 (Visit Specific Satisfaction Survey System), a turn-key approach to patient satisfaction measurement. Rx: VS4 measures and tracks client satisfaction for any health care business/practice, including solo, small group and large multi-specialty group practices, hospitals and specialty practices, such as dental or optometrist offices. Rx: VS4 can be used in both fee-for-service and HMO

settings.

Rx: VS4 combines optical scanning, proprietary databasing and reporting applications to provide the end-user with an analysis of their services. In addition to providing details about the overall effectiveness of the individual doctor's or group's performance, Rx: VS4 also provides total aggregate reporting for the network, practice comparisons by specialty and individual provider comparisons. All scores are compared to the scores from the Medical Outcomes Study (a study of more than 18,000 patients who visited the offices of participating solo, small group and large multi-specialty group practices in both fee-for-service and HMO setting).

The survey process — from questionnaire to data analysis — is complete within four to six weeks. HealthLink America provides each provider 200 postcard-sized surveys to start the survey process. Every card is assigned a serial number for accurate measurement and the cards are given to patients after their office visit is complete. The questionnaire

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ADVERTISING RESEARCH CONFERENCE:

The Advertising Research Foundation will hold its annual conference and research infoplex on March 23-25 at the New York Hilton & Towers. This year's theme is "Breaking Away: Setting Your Own Agenda." For more information call 212-751-5656 or visit the ARF Web site at <http://www.arfsite.org>.

MARKETING RESEARCH TECH '98:

The Silicon Valley AMA, CASRO, MRA and Golden Gate University are co-sponsoring the Marketing Research TECH '98 conference and exhibition on April 2-3 at Golden Gate University in San Francisco. The one-and-a-half-day conference will focus on computer-based and interactive research methods such as Internet, Web-based and disk-by-mail surveys as well as CATI and video focus groups. It will include guest speakers from Netscape, Broderbund, Charles Schwab, UPS and Intuit. Representatives from several research firms will also be on hand. For more information call 650-994-2429 or visit the conference Web site at <http://www.sotech.com/mrtech98/>.

DESCRIPTIVE ANALYSIS WORKSHOP:

Tragon Corp., a Palo Alto, Calif., research firm, will conduct a workshop entitled "Descriptive Analysis" from May 4-6. The workshop includes topics such as: developing a descriptive capability subject selection and training; test design and analyses, comparison of QDA, Flavor Profile and Texture Profile methods. The program will be held in Palo Alto. For more information call 650-365-1833.

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Names of Note

Saranne Soule and **Denise Krause** have joined *Polaris Marketing Research*, Atlanta, as project managers.

Patricia Wehner has been appointed senior vice president of *Decision Insight*, Kansas City, Mo.



Wehner

Dehnert

Knowledge Discovery One, an Austin, Texas, maker of data mining software, has appointed **Paul Dehnert**

chief executive officer. In addition, the company has named **Joe Dalton** executive vice president of sales and marketing; **Coyne Gibson** chief technology officer; and **Larry Wikelius** vice president of software development.

Migliara/Kaplan Associates, an Owings Mills, Md., research firm, has expanded its account staff. New hires include: **Mary Lynne Nelson**, director of computer services; **Linda Diehl**, director of human resources and corporate development; **Barbara Kaplan**, director of marketing; **James Parrish** and **Robert Shunkwiler**, account manager; **Steven Hollander** and **Fred Newman**, vice president. Promotions include: **Paul Barnes**, **Sherry Danese**, **Dawn Fleck** and **Brian Hull** to account manager; **Gerarda Collins**, **Graham Crawford** and **Lorna Walters** to vice

president.

SOFRES Intersearch Corp., Horsham, Pa., has named **Daniel Bloom** vice president and director of Latin American and Hispanic Research.

John Golanty has been promoted to president of *Conway\Milliken & Associates*, a Chicago research firm. In addition, **Barbara Conway** has been promoted to executive vice president.

SPSS, Chicago, has appointed **Michael Blair** to its board of directors. Blair is chairman and chief executive officer of *Cyborg Systems, Inc.*

Paint & Decorating Retailers Association (PDRA), St. Louis, has



Weiss

O'Daniel

welcomed back **David Weiss** as director of market research. He returns to PDRA from an 18-month stint with *NFO Research Inc.* In addition, PDRA has appointed **Whitney O'Daniel** market research analyst.

The Society of Insurance Research (S.I.R.) has elected **Russell Bingham** as its president. He is director of corporate research with the *Hartford Insurance Company*. Other officers elected at S.I.R.'s annual business meeting include: **J. Brad Wilson**, president elect; **Michael Murray**, vice president conferences & workshops; **Wayne Holdredge**, vice president long range planning; **Diana Lee**,

continued on p. 80

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Cat.	%	n
Did Not Respond	67.89	5428
Responded	32.11	2567
Total	(100.00)	7995

Response to promotion

Number of visits before promotion
> 4.500 <= 4.500

Cat.	%	n
Did Not Respond	41.50	1018
Responded	58.50	1435
Total	(30.68)	2453

Cat.	%	n
Did Not Respond	79.57	4410
Responded	20.43	1132
Total	(69.32)	5542

Spending before promotion

> 97.505

Cat.	%	n
Did Not Respond	23.68	179
Responded	76.32	577
Total	(9.46)	756

<= 97.505

Cat.	%	n
Did Not Respond	49.44	839
Responded	50.56	858
Total	(21.23)	1697

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Neural networks

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- AnswerTree enables you to specify the outcome you want to use as the basis for classifying data

AnswerTree

Market Facts, Inc., Arlington Heights, Ill., has acquired **Strategy Research Corp.** of Miami. With 1997 revenue of \$6 million, Strategy Research is a full-service research firm specializing in the Latin American and U.S. Hispanic markets. Market Facts has held a minority ownership position in Strategy Research since 1996. Strategy Research will operate as an autonomous entity within Market Facts, under the direction of its current management.

Chilton Research Services, Radnor, Pa., has started working with Drs. Paul E. Green and Abba M. Krieger, professors at the Wharton School of the University of Pennsylvania, to market VOICE, an analytical and predictive model for

measuring customer satisfaction, to Chilton clients. The model collects data on a firm's competitors as well as on its own customers and specifically targets attributes on which the firm should focus attention.

ESRI, a Redlands, Calif., developer of geographic information system (GIS) software, and Danish Hydraulic Institute of Horsholm, Denmark, have announced plans to enhance the hydrodynamic modeling capabilities of GIS software.

ACNielsen, Stamford, Conn., has acquired **Entertainment Data, Inc.**, a Beverly Hills, Calif.-based provider of box office information for the motion picture industry.

Focus Pointe has opened a new

focus group facility in Boston, featuring a full-service staff, four focus group suites, each with a spacious conference room, multi-level viewing room and private client lounge. Remote audio and video recording facilities are featured and private client offices with telephone and modem hook-ups are provided. For more information call 800-220-5088.

Spiller & Reeves Marketing Research Services, Bradenton, Fla., has changed its name to **Spiller Research Group**. The company has diversified its services to include custom research, syndicated studies and conference research.

Discovery Research Group, Irvine, Calif., has remodeled and expanded its facility, adding fully equipped client offices, expanded viewing areas and office space, client conference rooms and all new furnishings. The company has also expanded its phone room. For more information call 800-689-4374.

NFO Worldwide, Inc., Greenwich, Conn., has acquired **CM Research Group Limited**, Auckland, New Zealand. CM Research Group provides custom market research in New Zealand and Australia. It will become part of The MBL Group Plc, NFO's European, Middle Eastern and Asia/Pacific operating organization. NFO acquired 100 percent of the outstanding stock of CM Research Group for approximately US\$8.8 million, including the assumption of debt.

Gordon Bailey & Associations, Inc., has merged with **Phyllis Vail Research, Inc.**, and **Target Response Systems**, a database marketing company. All three firms are

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THE NEW PRODUCTS EYE CHART
HOW CLEAR IS YOUR VISION?

P R I C I N G P R
 O D U C T C O N F I
 G U R A T I O N F O R E
 C A S T I N G P O S I T I
 O N I N G T A R G E T M
 A R K E T D E F I N I T I O
 N I D E A T I O N C O N S U
 L T A T I O N M O D E L I N
 G A N D S I M U L A T I O N
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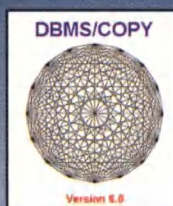
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A review of four powerful data analysis programs for Windows 95



DBMS/COPY 6.0

DeltaGraph 4.0

SPSS Diamond

SYSTAT 7.0



By Steven Struhl

Editor's note: Steven Struhl is vice president, senior methodologist, at Total Research in Chicago. He can be reached at SMStruhl@aol.com.

Statistical analysis programs for the PC have become increasingly powerful over the last several years — as many of you doubtless already know. The most widely used programs, SPSS and SAS, have incorporated many major enhancements and new features. SAS has even conceded that its suite of programs should run under Windows, adding an interface that more or less looks like other Windows programs — and an extra 1,000-page manual to describe new procedures and general “enhancements through version 6.11.”

SPSS, Inc., though, has kept an even more torrid pace in product development. Its main program has had three major releases in the last 18 months (and we will discuss the newest, Version 8.0, in an upcoming issue). This program has made major strides toward more formatted, finished-looking output in the form of “objects” which other Windows programs can use and edit. It has refined its menu system, and added new procedures. And still, at the same time, SPSS has added a large number of new products to its line of offerings.

This review discusses four programs with widely divergent capabilities in analyzing, displaying, translating, and exploring data. They share one common thread: SPSS now manufactures and/or distributes all of them. (These programs work as stand-alone products, not requiring you to have SPSS to use them.) Each of these programs will add

substantially to your data-handling abilities, even if you already own SPSS and all its options.

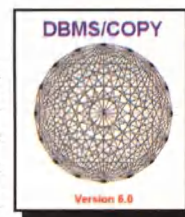
DBMS/COPY

This program takes a basic idea and executes it with tremendous power and skill. DBMS/COPY bills itself as “the tool for software connectivity,” and this is as precise a description as you will find for a software product. DBMS/COPY allows you to talk to (and use the data from) nearly any analytical or database program that you have ever seen — and many that you have not.

The need to connect becomes more important as we make more use of data stored on mainframe-style computers. In particular, now that we can dig into huge customer and prospect databases, we find ourselves in territory where Windows cannot make it easy to cut and paste the data we want into our favorite programs.

DBMS/COPY fills this gap nicely. It imports and exports to and from about 75 basic file formats and includes several versions, or flavors, for many of them. I find two specific features of DBMS/COPY of most interest. First, this program lets you use SAS data files in their “native” formats even if you do not have SAS. Second, it gives you an easy, visual method to read in multi-line ASCII data files. (That is, files that the “text import wizards” in Excel, for instance, cannot handle.)

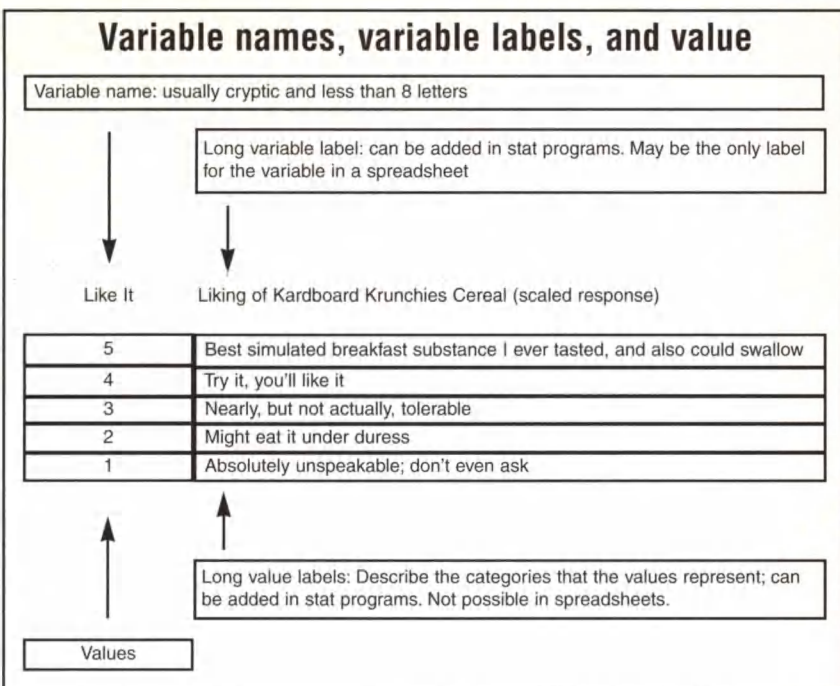
The range of DBMS/COPY is almost confounding. Need to use Rbase data? Rats? Forecast Pro? Abstat? NCSS? DBMS/COPY will handle all of them.



Have a client or colleague who insists on getting data in Y-Stat format? PRO-DAS? Again, no problem. (Perhaps you are luckier than your author and have not met people like these — but then, things always can change suddenly for the worse.)

In addition to translating data, DBMS/COPY lets you view the data, sort it, filter it, transform it with numerous functions, and (for programs that support this) change the data type as needed.

The program works swiftly and efficiently. It launches quickly and plainly, with no fancy opening screens or “splash panels.” File translations run nearly as fast as doing a simple file copy. The commands have an amusingly quirky, but direct, quality. The “interactive” mode, for instance, has the label notifying you that “it doesn’t get any easier than this.” Also, I believe DBMS/COPY is the only data translation program having an author who appeared in a production of Shakespeare’s *Much Ado about Nothing*. A careful examination of the DBMS/COPY Web page (www.conceptual.com) will reveal this and several other astounding facts.



There are just a few things DBMS/COPY does not do that I would put on a wish list. The current version does not yet read long value labels from SAS, but you can expect this soon. (SAS does not cooperate with meddling outsiders who want to know about their file formats, so the

continued on p. 59

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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. He can be reached at 818-782-4252 or at artshulman@aol.com.

Don Millsap of LUCID Research Services tells about moderating a focus group in a motel conference room in rural Mississippi. The topic: studying alternative versions of a farm equipment radio jingle. Millsap played his tapes, while the hard-working soybean and rice farmers listened, mostly with heads bowed. Millsap then waited for reactions.

After a moment, a man looked up. "This all you got to do?" he asked. Millsap froze, too embarrassed to respond to the farmer's painful question.

Mark Michelson of Michelson & Associates relates some more reasons he has heard from mystery shoppers for not completing shops:

"My husband died last night, but I can go this weekend. It will do me good to get out."

"My car was stolen with the completed report in it. I can't recall the shop, but will you still pay me? I need the money now that I don't have a car anymore."

"I can't leave my apartment because my cat is sick. Maybe next week."

Arnie Fishman of Lieberman

Research Worldwide tells about designing a study for a pet food company interested in determining how many people ate dog food. Early on, the astute Fishman recognized that you can't just come out and ask people if they eat dog food. Who would admit to it? So, his questionnaire started out by informing consumers that the survey concerned consumption of "exotic foods." Consumers were then asked if how often they ate a variety of foods such as rattlesnake meat, gopher brains, chocolate covered ants, frog kidneys, and, of course, dog food.

Fishman reports that there are more people out there than one might expect who say they eat dog food "all the time."

Of course, in the context of his battery of "food" items, eating dog food seems relatively normal. In fact, there's a suspicion that some people may want to consider themselves at least somewhat exotic, and claim to do something they don't really do, since denial of eating any of the foods may make them seem dull. Thus, his percentages of those who admit to eating dog food may be overstated.

Stephen J. Hellenbusch of Q2 Marketing Research got a chance to test the old market research rule that you never ask respondents the same question twice. In one of his studies, 545 adult consumers were asked their ages at the beginning and at the end of

a 20-minute interview. (This was done intentionally, not because Hellenbusch forgot he asked the age question at the beginning of the interview.)

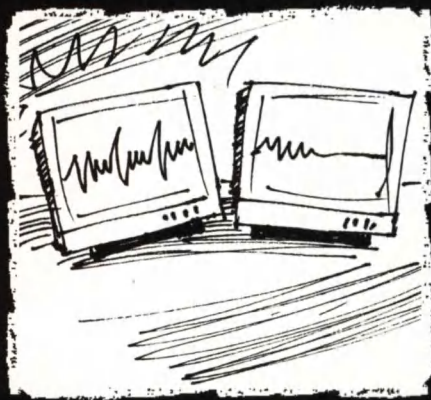
To his surprise, 6 percent changed ages. Of the 34 people who changed ages, 46 percent became older (26 percent by exactly one year) while 54 percent became younger (38 percent by exactly one year).

Consultant Alan Fine reports that when he worked for a supplier earlier in his career, clients occasionally called and asked if his firm could complete a study and provide a report within a very unreasonable time period. Fine would tell them, "Listen, I have a report on tuna fish, and if you want I'll just replace 'tuna fish' with (the client's product type). And that's the only way I can get you the report in the time you want it."

Fine indicates that once in a while a client tried to take him up on his offer, with one of them saying, "Okay, but I want a 25 percent discount."

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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Consumers tell Maryland Lottery what it really means to hit the jackpot

When you think about winning a huge lottery jackpot, what comes to mind first? Mansions, yachts, chauffeured limousines, and travel around the world, right?

Wrong, if you ask the team at Baltimore-based advertising agency Eisner and Associates who worked closely with the Maryland State Lottery to develop a branding and positioning ad campaign for The Big Game — a multi-state, mega jackpot lottery game available to Maryland residents.

“Portraying extravagant winnings seems to be a logical path to go down,” says David Blum, Eisner’s vice president of strategic planning. “And if we hadn’t thoroughly probed into the mind-set of today’s lottery consumer, we would have ended up developing exactly this type of advertising. The ads would have been expected. They would have been just like other lottery ads, and they would have approached the consumer in the wrong way.”

Brand the product

The creation of Maryland State Lottery’s Big Game ads started with internal sales data analyzed by On-Line Product Manager Auburn Bell and Marketing Director Jill Baer, which showed Maryland’s Big Game sales were underperform-

cture



One TV spot, "Lockstep," shows a lottery winner relaxing as his neighbors trudge off to work in unison.

ing compared to other states that offer the product. The challenge was to find out why and help brand the product.

Initial quantitative, qualitative and anecdotal data painted a clear picture of the situation at hand:

- Maryland lottery players were confused. Players routinely said there were too many games being offered and they had a hard time keeping track of them.

- The Big Game was often confused with Lotto, the state's traditional Pick 6 jackpot game. Some thought The Big Game was just another name for Lotto.

- Players consistently underestimate the size of the Big Game jackpots, which average in the \$20 million range. Few could believe the highest ever jackpot was in the \$80 million range.

- Most players didn't realize there were a total of nine ways to win — eight others besides winning the whole jackpot.

- While there was concern that a Maryland resident didn't always win the big jackpot (players come from seven states), few realized that more than 30,000 Marylanders won something each week playing the game.

As a result, it was clear the product needed a differentiated position from all other Maryland lottery products in general and the Lotto in particular.

Once again, the consumer stepped in to help. "If it's the most I can win, why don't you just tell me," the players seemed to demand in focus group settings. Thus, the positioning idea was simple, clear-cut and unique — The Big Game, Maryland's Biggest Jackpot Game. Moreover, the product was further differentiated from Lotto by branding Lotto as Maryland's Classic Jackpot game at the same time.

Demonstrate the concept

The creative challenge for Bill Mitchell, Eisner's creative director, and his team was to find the best way to demonstrate what the concept of the largest jackpot — or winning an awful lot of money — means to the consumer today.

Consumers repeatedly said one notion not only defined what winning lots of money means to them but defined how they view life: I CAN RELAX. In essence, I can do anything I want to do.

The freedom to relax is entirely

consistent with much of the Lottery's and Eisner's secondary research into today's consumer. Relaxation means empowerment. Most people like their jobs and their bosses, but they'd like the power not to work if they so choose. Relaxation means precious amounts of time which are rare today. Relaxation means focusing on the family and on the few things that are really important to the individual.

A number of creative executional directions were developed for further consumer review. Some of the directions included:

- Winning means revenge against my boss.
- Winning means I can quit my job.
- Winning means I can spend freely on whatever I want.
- Winning means I have a luxurious lifestyle.
- Winning means I don't have to sweat the small stuff.

According to Mitchell, "Listening to the market helped us take the seed of an idea and make it even grander. In fact, 'Sprinkler,' one of the spots eventually produced, which shows the simple concept of a man leisurely and happily watching his sprinkler all day

continued on p. 54

It's about

Research leads Nebraska health network to focus on speed of service in its ads

When you think of visiting your local health clinic, you think about waiting. Waiting to check in, waiting to get into the exam room, waiting to see the doctor. Anderson Partners, an Omaha, Neb., advertising agency, seized on the idea of time as a point of focus for a campaign it developed for University Medical Associates (UMA), an Omaha-area network of health care centers.

The campaign, which began running during the fall of 1996, promises that when patients make an appointment to visit one of UMA's clinics, the staff will do its very best to get them in to see the doctor within 15 minutes.

The idea for the "15-minute no-wait commitment" campaign grew out of findings from some exploratory focus groups, says Deb Ahl, director of account services, Anderson Partners. "We found that length of wait is a major issue for health care users. In the focus groups, people commented that as they waited, they felt their time was not as important as the doctor's time. They also felt like they were being ignored. We also found that most respondents were unaware of the University Medical Associates or its clinics. We took that information and developed a campaign that would break UMA out of the pack."

By Joseph Rydholm
QMRR editor

Most of the health care-related advertising in the Omaha market, Ahl says, uses a warm-and-fuzzy approach, as is common in most other markets. So Anderson Partners decided the ads had to be a little edgy if they were to stand out. "We were going in with a lower budget so we felt we needed to zig when the competition zagged so that our advertising didn't get confused with that of our competitors," Ahl says.

The tag lines for the radio and print ads include "It's about time," referring both to the 15-minute commitment and the fact that it's about time that health care facilities take a more consumer-oriented approach. Others include "Does waiting at the doctor's office make you sick?" and "If seeing a doctor is a pain, call UMA for fast relief."

Awareness rose

The ads began running in 1996, during the spring and fall enrollment periods when people typically make decisions about health insurance plans. "We wanted to have our name out there during enrollment time to make sure that



u t t i m e



they would look at what UMA had to offer," Ahl says.

Prior to launching the campaign, the agency conducted phone surveys to measure unaided awareness. In the spring of 1997, tracking research was conducted. The results were gratifying, to say the least: from the fall 1996 pre-launch period to spring 1997, unaided awareness of UMA doubled and aided awareness rose substantially as well.

"There was a meaningful segment of the sample that had unaided recall for the waiting room advertising commitment itself, so there was some recognized sponsorship. One of our goals was to make sure that our advertising broke out and that we didn't have our advertising confused with or tied to another health care facility," Ahl says.

Concerned about acceptance

One obvious concern was getting the doctors to agree to participate in the 15-minute commitment, says Gregg Dahlheim, senior marketing coordinator, Nebraska Health System. (University Medical Associates is an affiliate of Nebraska Health System.) "We were concerned about getting acceptance internally before we began running the ads, so there was a certain amount of sell to the physicians, some of whom were not quite as confident that the 15-minute commitment could be met," Dahlheim says.

But after seeing some figures on how long it was currently taking for UMA's patients to see doctors, the doctors realized most people were already getting to see their care providers within 15 minutes. "That made it easier. Above all, we want to make sure that the patients feel that they aren't being ignored and that we acknowledge that their time is important," Dahlheim says.

"We didn't want UMA to be looked at as the Jiffy Lube of doctors," Ahl says. "The ad copy addressed the fact that the 15 minutes referred to the time spent in the waiting room and that the time of care once in the exam could be longer. The tag line 'We'll rush you in, not out' reinforces that."

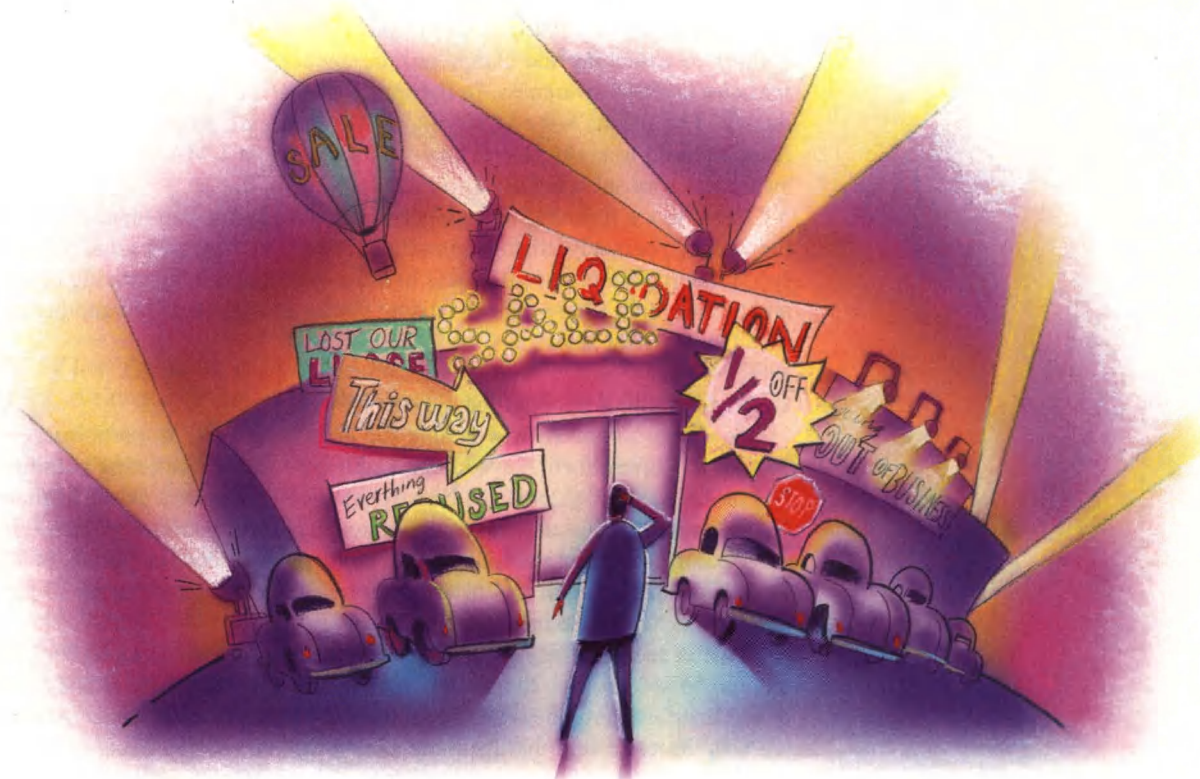
Bit of a switch

The ongoing print and radio campaign is a bit of switch for University Medical Associates, which had relied on direct mail in the past as its main advertising vehicle. "In the market we're in, most health care facilities and clinic locations rely heavily on television. They spend, in relation to us, in some cases almost 10 times as much," Ahl says.

But UMA is getting the most from the campaign. Consumers are clearly noticing the program and so are competitors — one clinic network has begun promoting its short wait times as well. So any major changes in the campaign will have to wait, Ahl says.

"We want to make sure we've hit this strongly before we change it and that's why we have continued it in a form that has evolved over the past year and a half. At this point we're looking at continuing that and we'll do another tracking survey to see where the levels are. If the levels are high enough that we're comfortable we've made an impact and that consumers are fully aware of the program and they can tie it back to UMA as sponsors, then we will look at putting a different twist to it." □

Oh, we of little faith! *Advertising works, believe it or not*



By Jerry W. Thomas

Editor's note: Jerry Thomas is president of Decision Analyst, Arlington, Texas. He can be reached at 817-640-6166.

The Federal Trade Commission believes advertising works. Ralph Nader and other self-anointed "consumer" advocates believe advertising works. Many economists and academics believe advertising works. These disparate groups tend to believe advertising is so awesomely invincible and massively effective that it can make poor, helpless consumers buy things they do not need and do not

want, that advertising can drive competitors out of business and create monopolistic dominance in a marketplace, that advertising is an insidious and pervasive force that has the power to modify human behavior. But not everybody believes in advertising.

We who create advertising, use advertising and try to evaluate advertising are the disbelievers. Oh, we say we believe, but in our innermost heart of hearts, the doubts won't go away. Too many times have we watched our brilliantly conceived advertising have no apparent effect upon sales or market share. Too many times have our

bright hopes been dashed on the rocks of reality, or submerged in a tide of ambiguity. If we cannot consistently observe the positive effects of advertising, it is only natural that we suffer the pangs of advertising agnosticism.

Oh, we of little faith! Why is it so hard for us? Perhaps a recitation of the mechanisms by which advertising works will help restore our lost souls:

- Advertising can create awareness. Brand awareness alone works in three important ways:

1. Awareness creates the possibility of purchase. People cannot buy a product they are unaware of.

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2. Awareness helps people see a brand in the store. Awareness affects perception. As a brand's awareness increases, the consumer's ability to see the brand in the store increases. An example: Did you ever learn a completely new word and, in the days that followed, were surprised to see and hear the word repeatedly? Nothing had changed, except your awareness. The new word was not suddenly being used more frequently by society. You were merely perceiving it for the first time. In the same way, awareness helps us

All other factors being equal, the higher a brand's awareness, the more favorably that brand is perceived.

"see" a product on the shelf.

3. Awareness biases people in favor of the "aware" brand. All other factors being equal, the higher a brand's awareness, the more favorably that brand is perceived. High awareness tends to create a halo effect, a positive bias toward all aspects of a brand.

• Advertising can create a model people wish to identify with and imitate. The modeling instinct is one of the most powerful impulses in the psyche. Children model after their parents. Employees model after their bosses. Hero worship and hero emulation are common human experiences. We all imitate people we admire. We are all copycats, though most of us are not aware of just how much. Advertising can create personalities and images

that trigger the modeling instinct. If the personality or image portrayed is one people admire, they will tend to identify with those personalities/images and subtly modify their behavior in that direction. The Marlboro Man is a classic example of a psychological archetype people have chosen to identify with in cigarette brand choice.

• Advertising can communicate new information. Humans are semirational creatures who will, in weaker moments, respond to facts and reason and modify their behavior accordingly.

• Advertising can suggest, and humans are suggestible creatures. The placebo effect is as common in everyday life as it is in medical environments. That many people can be hypnotized indicates how susceptible homosapiens are to suggestion. The day-in, day-out repetition of an advertising message, if acceptable to the conscious mind, can reach and influence the unconscious mind. Later, these suggestions feed back into consciousness as feelings altering perceptions and behavior. Responsiveness to suggestion is a subtle process and one peripherally related to the modeling impulse.

These are the principal psychological processes by which advertising influences consumer behavior. These processes are not readily visible in everyday experience because they are subtle and intertwined. But do not despair. Believe! Have faith! Advertising really does work. Sally forth with renewed conviction and use these psychological principles to make your advertising more effective. □

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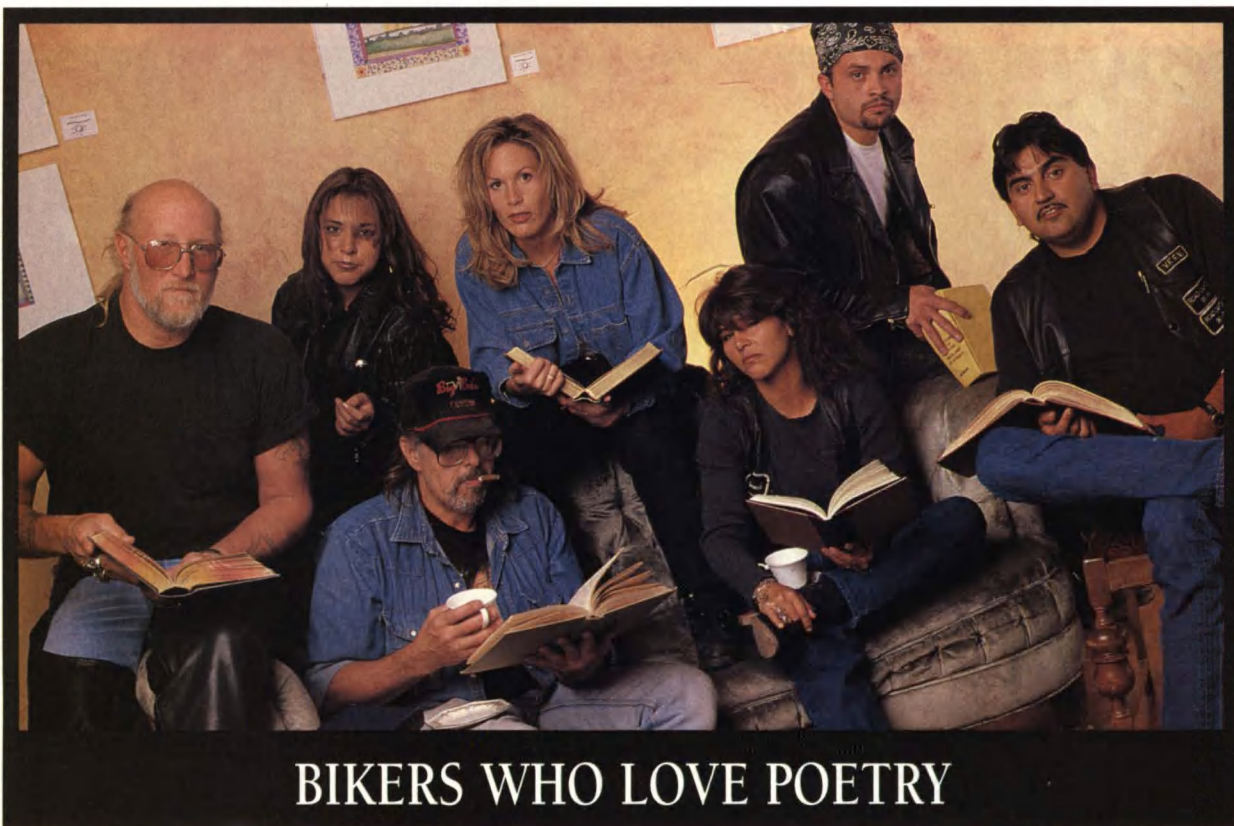
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QMRR roundtable finds research in flux

In conjunction with the American Marketing Association's Attitude and Behavioral Marketing Research Conference in January, I moderated a lively and good-humored roundtable discussion with seven research industry members. The participants responded to questions on a variety of topics, including the changing role of research, the effect of downsizing, declining respondent cooperation rates, the impact of the Internet, and the increasing globalization of business.

The participants were:

- Elyse Gammer, vice president, Dennis and Company, Inc., a Stamford, Conn., research firm, and president of the Marketing Research

Association (MRA), Rocky Hill, Conn.

- Pat Goodrich, director, Marketing Research Division, American Marketing Association (AMA), Chicago.

- Barbara Hisiger, director of research, AT&T Labs, Murray Hill, N.J., and vice president, Marketing Research Division, American Marketing Association.

- Mike Lotti, director, business research, consumer imaging, Eastman Kodak Co., Rochester, N.Y.

- Wayne McCullough, director, marketing research and analysis, Banc One Corp., Columbus, Ohio.

- Betsy Peterson, executive director, Marketing Research Association.

- Juergen Schworer, director gen-

eral, European Society for Opinion and Marketing Research (ESOMAR), Amsterdam, The Netherlands.

The following is an edited version of the two-hour discussion. Special thanks to Jamie Born, the AMA's director of public relations, for assembling the panel.

—Joseph Rydholm/QMRR editor

QMRR: What factors have had the greatest impact on marketing research in recent years?

Betsy Peterson: Several of us just attended a Research Industry Leaders Forum and the focus there over the past few years has been determining what the major issues facing the industry are. They include: declining



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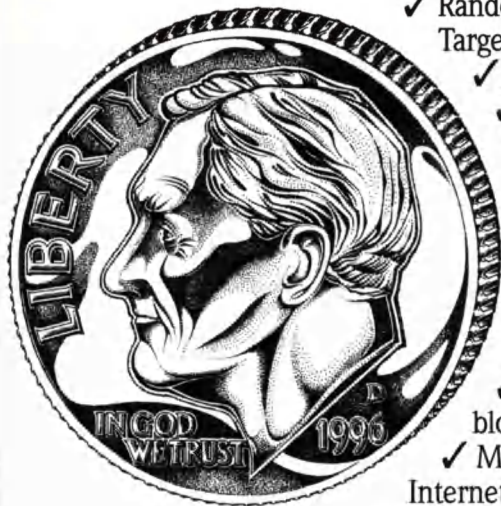
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respondent cooperation, legislative threats, a shortage of trained researchers, and the impact of technology, specifically the Internet and other applications.

Wayne McCullough: I think downsizing has caused a fundamental change to marketing research. When staff reductions came about in the late '80s and early '90s they were across the board. Most companies didn't say, 'We need to save this function and that function.' The research function suffered as a result. With all this turmoil, many expert market researchers went out and started their own firms. The flow of intellectual capital started outward. The problem we've had more recently is that many [client] firms started to recognize that that outflow of personnel took with it a core body of knowledge, a core competency of market intelligence. And now they're starting to recognize the need to bring it back.

Barbara Hisiger: The evolution or revolution of skills and training has actually incorporated more fields like psychology and sociology into what we call marketing research. One of the issues is the question of how we attract the right kind of people to the industry. And what do we call ourselves? Are we just market researchers or are we behavioral analysts? How do we distinguish this broad field?

Wayne McCullough: The point you're making is extremely important and one that the AMA and the MRA and other associations are dealing with and that is the idea of certification. One of the things that occurred as a result of the downsizing of research in many categories is that we had lots of other people within firms who said, 'I will now manage marketing research,' even though they have no real skill or competence. They tended to rely on those external firms to get the work done and bring it back. But the assimilation of that core knowledge and intelligence wasn't happening. Lots of people think they can do market research when in fact it was the external firms that are doing it.

Barbara Hisiger: It's a matter of defining the needs of the industry. We need to involve the industry in defin-

ing the skill set.

Elyse Gammer: I think there's also been an ancillary effect at the end-user level, which is that as marketing research has become diluted within the company, the value of it and the resources used to derive the benefits and apply the information has been scattered. There's not someone steering the ship or it's not the right person steering the ship. It's the person who said, 'I can do market research' and then they went to the helm.

Mike Lotti: There are a lot of folks that are trained in marketing research techniques but not in when or why to use them.

Wayne McCullough: I know I brought up the C word [certification] but let me make it clear that I'm not saying that we should or must have it. I want to assert the principle that Barbara was articulating: We need to take a look at what we do and how we do it. If you're selling real estate you have to take an exam. If you're a medical doctor or a lawyer you have to do the same thing. Should the same apply to a marketing researcher?

Mike Lotti: Possessing the necessary toolbox goes beyond just choosing a technique. You have to know how to define a problem, develop a researchable hypothesis and bring back information which bears on the decision to be made. We have people trained in techniques but sometimes we're not as good at diagnoses.

Betsy Peterson: Isn't that why it takes so long for researchers to be really productive? It's trial and error now.

Mike Lotti: Today a lot of the learning is done by observation and learning on the job and that's exactly what worries me. People may not have the opportunity to learn in the current setting, with constrained personnel resources.

Wayne McCullough: The question for the larger category of researchers is, at what point can you say, 'I'm an expert researcher?' I think the point that Mike was making was that the good ones learn along the way and I think that we need to do a better job of giving them those experiences. We need a way to anoint someone who has achieved a certain level of experi-

ence. Credentialing is what we need to achieve.

Barbara Hisiger: To attract people to the profession, we need to do a better job of marketing ourselves. We deal with marketing in our jobs every day and yet we don't do a very good job of positioning or marketing our profession.

Wayne McCullough: One of the damning statements about our industry is that we talked about that very subject at the last two conferences...

Betsy Peterson: ...and we've talked about how we talked about it!

Pat Goodrich: I think there is a crying need for some sort of industry definition of the skills that are necessary to be a researcher, whether it's through certification or not. And I think we've made some initial steps toward that. There are Masters programs that would like to graduate 60 people a year. We certainly can't rely solely on them as a source of new researchers but while we struggle to define what a researcher is we have to also work at attracting people to the industry and when we attract them, let them know that there is an established set of things they have to do to illustrate competency.

Juergen Schwoerer: Nowadays geographical and industry boundaries are blurring. We can and we should set up education programs but even once we have people who have the basic set of skills our industry will not automatically flourish. That's because this boundary-blurring will continue and people who aren't researchers will continue to believe that they can conduct research.

I think it is equally important at the university and business school level to open the minds of today's and tomorrow's decision makers to the profit opportunities that lie in applying intelligence to their business. We must make sure that lessons on the value of research get into their curricula. Because you can train researchers until you're blue in the face, but if you don't have any clients who think it's worthwhile you may be out of business.

Betsy Peterson: We also have to define a clear career path. Can we currently say to somebody coming into

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the profession here are two or three career paths you can follow and be pretty certain it will happen?

Mike Lotti: One of the things we have to do is prove the value of research. We have to learn to think in terms of economic value delivery.

Wayne McCullough: I think you're raising a very good question of how can we sell the value of what's delivered. [At the client level] we need to make sure that we have someone who devotes a portion of their time to the selling proposition and making sure that people within the firm understand the value of research. It is an ongoing process of making sure that people understand the value that is derived, so when it comes time during budget cycles to determine the investment the company will make in marketing research you can demonstrate its value, its return on investment.

Mike Lotti: When management approaches marketing questions like, 'Should I do this promotion?' or 'Will I profit from this price action?' the decision is made with attention to the financial return. With market research, the revenue impact is less tangible. We need to make the impact of research on decisions which affect the bottom line more concrete. Then, management will be more willing to invest in the larger projects.

QMRR: Has all of this upheaval

forever changed the role of research?

Juergen Schwoerer: To be credible, to sit at the table, requires a researcher to have a larger set of skills than we have been traditionally working on and also requires a larger view of what other input goes into decision making. While we are doing all this work on education, etc., we should be sure to look also at other disciplines within the company like competitive intelligence, not with disdain, but to learn from what they do.

Barbara Hisiger: There are some people who will be adept at being an analyst. They shouldn't necessarily be at the table. The researcher/strategist who sits at the table knows that industry, that product and that project. He or she almost has to possess the skill sets of every other person at that table, including the product manager, project manager, the business strategist, competitive analyst. In some sense, they are the business cop who says either 'Yes, we should do this' or 'No, we shouldn't.'

Wayne McCullough: What we're proposing is something like a chief intelligence officer. In a sense the CIO doesn't have to have all those skills but the key is to have the right lieutenants who can break out that information.

Barbara Hisiger: At least they

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understand the business strategies so when the product champion says, 'I don't care what happens, I'm bringing my product to market' the researcher can say, 'Your product duplicates a product that already exists, all you're going to do is eat our own lunch.' It's our job to say that it won't work.

Juergen Schwoerer: It's definitely one of our jobs but it's not our only job. We should also be a driving force for new businesses, new ideas. There are instances where you have to say no. But if that happens too many times the credibility of being a proposing force is weakened. We should focus on how we can come up with new ideas instead of merely opposing ones that are brought up. I think risk taking is part of that. There must be a willingness to stick your neck out and say, 'I recommend we do this.' It's being part of the team that actually manages businesses.

Elyse Gammer: To put some perspective on this, marketing research is a relatively young industry, as compared to other professions. We're becoming more sophisticated in understanding what we need now that we've reached a certain point but it's only been a profession for about 50 to 60 years.

Mike Lotti: One of the insidious effects of downsizing is that many of the senior people in corporations today don't have time to train young analysts. When I joined Kodak, I got to work along side some real giants in the industry and learn how to do the critical research definition tasks. Nowadays we struggle in getting our supervisors to deal with our entry-level analysts because they're so taxed doing their own projects. Corporations need a mentoring program, a program that mixes basic structural learning with the experience of working closely with a senior individual. That will help new researchers learn how to actually get research applied in the real world.

Wayne McCullough: Perhaps it would make sense to go to a number of firms like Kodak and GM and talk about how they're structured. That would help us understand the different roles that are played by researchers at



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QMRR: What can the industry do about declining respondent cooperation rates?

Juergen Schwoerer: Comprehensive research has been conducted and I think there are three things that would help increase respondent cooperation. One, being honest with respondents about the time it takes to interview. Two, distinguishing research more clearly from direct marketing. Three, show the utility of

marketing research. We should try to demonstrate to the public that beyond helping companies create and sell more products, research actually contributes to a number of other things in society. Once you have made that point it becomes much easier to sell that idea that your opinion counts.

Betsy Peterson: I think that the one thing that we have learned from industry studies is that there is no one answer. It's going to take a multi-pronged approach to move the levels

of acceptance.

Juergen Schwoerer: Another factor contributing to increased cooperation is to weed out the abuse of people's time and energy that comes about when you ask them trivial questions like, Are you happier this morning than you were yesterday? We can do without that type of useless information.

Betsy Peterson: I think we've done a good job with journalists and legislators at getting the word out but we haven't been reaching the general public. We did a study like the one ESOMAR did and we found the similar three things. But who is it that talks to the consumers every single day? The interviewers around the world. But we haven't provided them with all the necessary tools just yet to help them make a difference.

Elyse Gammer: The MRA has done research on research and talked with respondents in focus groups about the interview experience and no matter what their level of education or income, they were very clear on what we were doing; it wasn't something that was arcane or obtuse to them. All they wanted from the research process was some acknowledgment that they had contributed something and that we have shown respect for their time.

Betsy Peterson: Key factors in respondent satisfaction are the introductions, closings, and other things that we say to the respondents. We have recommended a plan and will be following up on this with CMOR [the Council for Marketing and Opinion Research]. The idea would be to put respondents and interviewers in the same room and come up with the things that respondents want to hear to make the research process meaningful and interesting for them. In addition, do we know what the core competencies for an interviewer are? Do we know how to test for that skill set or at least have an idea how to select interviewers who have strong potential to develop the competencies?

Wayne McCullough: [The discussion of interview length] brings us back to professional standards. The



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reason for the longer questionnaires is, of course, the product managers who want everything in there. And the expert researchers will say, 'I know that to get the best information we need to be about x minutes maximum on this interview, so we have to start figuring out where we can cut questions out.' But the inexperienced researcher who will say, 'I want everything in there.'

Mike Lotti: This area [interview length] is one where the industry can help itself through basic research into the maximum length of interview by method of interview, like phone, intercept, etc. This type of information would help the client-side researcher, particularly those with less experience, to push back on requests to expand questionnaires beyond the quality limit.

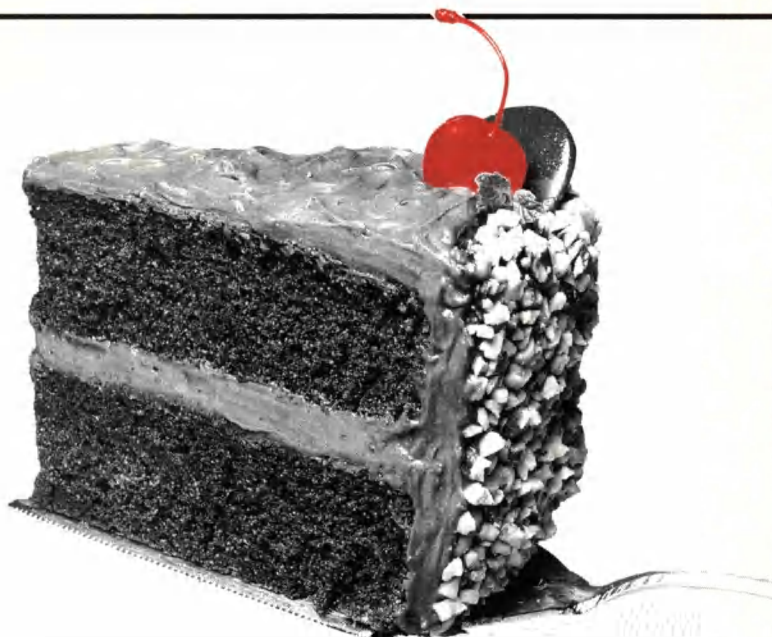
Elyse Gammer: I represent a supplier and I would love to be able to say, with credibility, to a client, 'We're not going to get much out of [a longer interview].' It's to our advantage monetarily to do a longer interview—it costs more money—but we don't want to waste our client's research time and budget. And so you try to be responsible about interview length but at this point the client may say, 'Well, why not? We've done it before.'

QMRR: What about the impact of the Internet?

Mike Lotti: I worry that as an industry we're getting all nervous about Internet research. It's here, it's real and it's going to be great for us.

Juergen Schwoerer: I think the Internet is obviously here to stay. I think it's going to be another added tool. It is valid for a number of purposes already today, though not for generally projectable samples of the general public. We'll need to develop some form of industry agreement on recruiting techniques to avoid using bulk E-mails and to make sure that quality standards as well as respondent privacy are respected.

Elyse Gammer: There are companies doing Internet research now and they are very aware of who they're speaking to and they use safeguards



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like passwords and ID numbers to obtain information from a population that still skews male, still skews highly technical, with few females and few older people. But they're aware of all those limitations. The Internet

population is going to change rapidly.

Mike Lotti: People say that it isn't projectable but I think under the right circumstances it's very projectable data. Interest in research on the Internet is so high. We've got to learn

to ride this tiger pretty quickly.

Wayne McCullough: [The data] can be projectable but it often isn't.

Barbara Hisiger: I'm not saying that mail and telephone are perfect, but there are certain people who are not on the Internet, they're just not, so in that sense the Internet is not representative.

Wayne McCullough: I think that's a marvelous point and I tend to align with Barbara in the sense that, take a look at mail and phone research. We know from lots of experience their strengths and limitations and we can easily incorporate them in. There are many more unknowns about the Internet at this point, certainly in terms of the population.

QMRR: Let's talk a little bit about the effect of globalization on marketing research.

Wayne McCullough: I think globally the issues are more diverse. Take the Internet, at the extremes you have Sweden and the U.S., and China. It will be well into the next millennium before there's enough capability to where you can make the Internet viable in China. Understanding those limitations as you go into those various countries can help but right now the U.S. and much of western Europe are much closer in terms of those dynamics so it's easier to collect good useful data. You have to recognize the wide variations of circumstances and the techniques that are usable across the regions.

Betsy Peterson: That would be my concern. As executive director of a major research association I get phone calls all the time [about international research]. In recent weeks they have come from small research companies who say, 'My client wants me to do research in South America or Asia. How do I go about doing that?' They don't even know how to approach it and yet they're being asked. So to me there's a wonderful education opportunity for those of us in industry organizations to provide information to make the situation better for people who are going to be using that data when it comes back.

Juergen Schwoerer: Business is global today and research therefore

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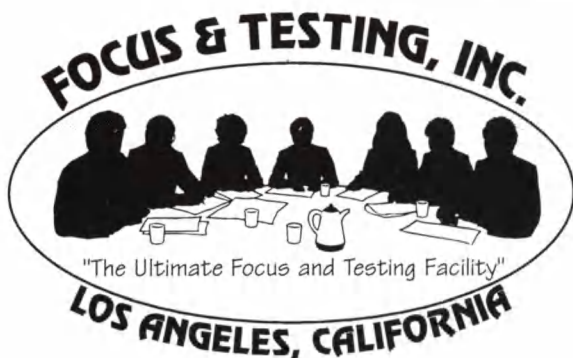


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has to be global. Indeed the best way to know what is happening in other places is to have access to the people who are there. One place to start is the ESOMAR directory to find firms who subscribe to internationally recognized codes of conduct.

I also think that although the discrepancy of equipment will prevail in a number of regions for awhile, at the same time it is possible to reach very narrowly defined but highly relevant targets of the population in almost every place in this world. I think the glass is really half full because I'm amazed at how you can instantly access top-notch intelligence in basically a hundred countries around the world.

QMRR: To finish up, what are your thoughts on the increase in client/research firm partnering that has resulted from downsizing?

Barbara Hisiger: Downsizing can be fine as long as consultants handle their duties responsibly, rather than adding more work, and are willing to turn work down if it's not essential or if they know that there is previous research that can be looked at. The other danger of downsizing is that you tend to lose within the client company someone with perspective, someone who knows that we did this five years ago and it didn't work so there's no need to do it again.

Betsy Peterson: Many companies are providing a means for consultants to get better informed. Some companies place synopses of past research studies on their computer intranets so the research partners can tap into that database.

Pat Goodrich: I've heard mixed reviews on the partner issue and the success of what we're calling partners. I have some real concerns.

Wayne McCullough: It's a very tough position for those firms because they're out there in the world of business and by turning down business you don't grow. There are a number of firms who will sit down as soon as another company leaves the table and say, 'Yes we can do that.' So where are the incentives in the system to do the right thing? It comes back to

making sure that we have a responsible person in place to arrive at the right judgments about that partnering relationship. In fact the success of those relationships can be driven by having someone knowledgeable inside selecting between more or less skilled firms.

Elyse Gammer: For those outside research firms who care about credibility and ethics, the reward incentive is a long-term relationship with the client which becomes mutually beneficial. That's the answer.

Wayne McCullough: Expertise in selecting the vendor should not rest with the purchasing departments. They don't understand the skill and selection criteria. They often try tipping the balance to drive down the price per interview and the vendor has to take out costs somewhere. The quality of the data suffers. It's the skilled researcher who understands those dynamics and makes sure that it's a win-win that optimizes the cost and the quality of the data. □

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locations. Within these pilot films a number of commercials are shown. Some of these are client commercials which are being tested. Before the commercials are shown the audience views different products as they might see them on store shelves. They are told that drawings will be held later which will allow them to win certain products for which they have indicated a preference.

After each show a drawing is held and the consumers are again instructed to select their products of preference in the event they win the drawing. By looking at the products the audience selected before and after seeing the commercials (before stimulus and after stimulus) we derive a persuasion score for each ad. In other words, would the audience be more likely to circle an ad for a Diet Coke after seeing a new TV ad for that product?

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because it measures the message and not the media. ARS measures people's actual behavior. Unlike focus groups and other types of surveys, we do not ask people whether they liked a certain commercial or their stated opinions regarding whether or not they might buy the product. Such research methods are all subject to bias.

After our testing, over the years, we have been able to validate our ARS test scores by matching them with actual sales results. Proof of such sales validation includes Nielsen store audits, split cable tests in electronic test markets in the 1980s and during this decade we have utilized sophisticated scanner data modeling.

What kind of TV ads sell?

At the request of several major clients we conducted a study of some 5,077 commercials which included an analysis of more than 150 different strategic and executional elements such as demonstration of the product in use, the use of humor, celebrity endorsements, a nutrition/health appeal and the utilization of four or more onscreen characters, for example.

In general, the study showed that those particular factors or elements

which emphasize brand differentiation and specific product attributes are the most important reasons why a TV commercial will be successful in persuading a consumer to buy a product. The study showed that some 2,160 commercials which highlighted the strategic element "new product/new feature" achieved the highest ARS persuasion scores and another 1,964 commercials stressing the element of "brand differentiation" recorded the second-best ARS rating.

In my opinion, this major study and others which we have conducted over the years reinforce the theory of legendary Madison Avenue ad man Rosser Reeves, who wrote about the "unique selling proposition" in 1961. His simple premise was that the most persuasive ads were those which illustrate a distinct product advantage or offer a distinct consumer benefit over those of competing products.

Over the last several decades, the Reeves theory (USP) fell into gradual disuse and generic advertising became the perceived wisdom. In hundreds of today's commercials, happy faces on young people, good times in some pleasant outdoor setting and entertainment, often provided by a celebrity endorser, seem to

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be the alltooften order of the day. Critics of today's generic TV advertising say that this kind of advertising may leave consumers with a pleasant feeling but gives them little reason to want to buy one product over another.

The key, however, is not necessarily having a unique selling proposition by itself but whether the selling proposition is meaningful. In this regard, our testing clearly shows that if the sales message is strong then you will have a far better chance of producing winning commercials. Over and over again, our research has shown that what you say is of primary importance, as opposed to how you say it.

Several years ago, another study we did indicated that a decades-old perception by advertising icon David Ogilvy was right on the money: TV commercial costs have an inverse relationship to a commercial's sales effectiveness. On average, the more money spent on production the less persuasive the commercial. In hindsight the results of our study of some 56 TV ads showed that cluttered, over-produced commercials often get in the way of the basic sales message.

After measuring the sales effectiveness of more than 100,000 TV strategies and commercials during the past 24 years, we know that a commercial's likability and memorability are meaningless as measures of sales effectiveness. Instead, the only criterion which should be used is the commercial's sales effectiveness. What will it do for the client's sales or market share?

Rational ads may be persuasive. Emotional ads can do the job. It might be a combination. Today's Generation X consumers may be influenced by sales messages that are somewhat different than the TV ads which were persuasive for their parents. But an advertiser will never know unless they test their TV advertising concepts and finished commercials before they spend millions of dollars to produce and broadcast them. □

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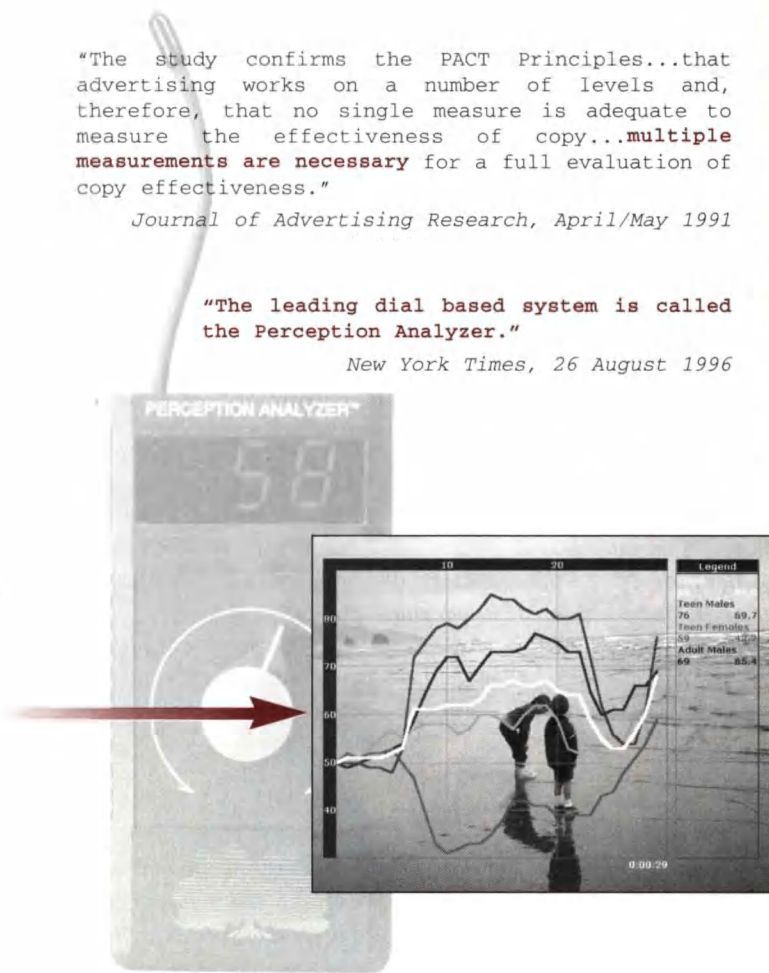
Marketing News, 6 January 1997

"The study confirms the PACT Principles...that advertising works on a number of levels and, therefore, that no single measure is adequate to measure the effectiveness of copy...**multiple measurements are necessary** for a full evaluation of copy effectiveness."

Journal of Advertising Research, April/May 1991

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How super are supermodels as advertising spokeswomen?

By Melvin Prince

Editor's note: Melvin Prince is president of Prince Associates, a Darien, Conn., research firm, and associate professor of advertising at Iona College. He can be reached at 203-327-2097.

Advertisers have long recognized the power of supermodels to influence consumers and have used their services as commercial spokeswomen for branded products. For example, Carol Alt has had numerous endorsement contracts (such as Lancome, Hanes, Cover Girl and Sasson), and television campaigns (such as Pepsi and General Motors). Cindy Crawford did a commercial for the Cadillac Catera. Christy Turlington was enlisted by Mercedes. Claudia Schiffer was used to target teenagers. Naomi Campbell and Kathy Ireland were spokeswomen for Frito-Lay. Kate Moss donned a milk mustache for an ad campaign sponsored by the National Fluid Milk

Processor Promotion Board. Wonderbra advertising featured Eva Herzigova.

At the apex of the modeling world, these supermodels are the subjects of numerous articles and photo sessions in such magazines as *Allure*, *Cosmopolitan*, *Glamour*, *Harper's Bazaar*, *Mademoiselle*, *People*, *Redbook*, and *Vogue*.

An examination of these magazines over the past two years yielded a list of the most frequently referenced supermodels: Amber Valletta, Angie Everhart, Anna Nicole Smith, Bridget Hall, Cameron Diaz, Carol Alt, Christy Turlington, Cindy Crawford, Claudia Schiffer, Daniela Pestova, Elle Macpherson, Eva Herzigova, Eve Salvail, Heather Locklear, Heather Stewart-Whyte, Helena Christensen, Isabella Rosselini, Karen Mulder, Kate Moss, Kathy Ireland, Krissy Taylor, Linda Evangelista, Liv Tyler, Nadja Auermann, Naomi Campbell, Niki Taylor, Nina Brosh, Paulina

Porizkova, Rachel Williams, Shalom Harlow, Stacey Williams, Stephanie Seymour, Tatjana Patitz, Tyra Banks, Vanessa Paradis, Vendela Kirsebom and Yasmeen Ghauri.

Supermodel image study

A study was conducted to measure the impressions of supermodels among young women, aged 18-24 (n=85). The survey addressed two primary areas: 1) imagery of supermodels and 2) opinions as to how good each supermodel would be as a spokeswoman for several product categories.

Respondents were asked to indicate which images described each of 37 supermodels in the study. The attributes were adapted from concepts in magazine article references to supermodels. Fifteen such image attributes were used: attractive, dependable, expert, classy, honest, experienced, beautiful, reliable, knowledgeable, elegant, sincere, qualified, sexy, trust-

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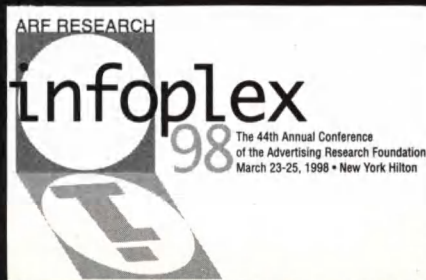
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Results were mapped and analyzed using correspondence analysis. The analysis of images shows a) general dimensions by which supermodels can be classified; b) how each of the supermodels studied rates along these dimensions; c) the specific images most closely associated with each model; and d) the clusters of models with similar image profiles.

A second task consisted of respondents giving opinions as to which of the same supermodels would be good as spokeswomen for advertising each of six product categories that have used supermodels as advertising spokeswomen: fragrances, intimate apparel, leather goods, jewelry, automobiles, fashions. The analysis of advertising spokeswomen ratings is

Figure 2: Perceptual Map of Supermodels as Spokeswomen

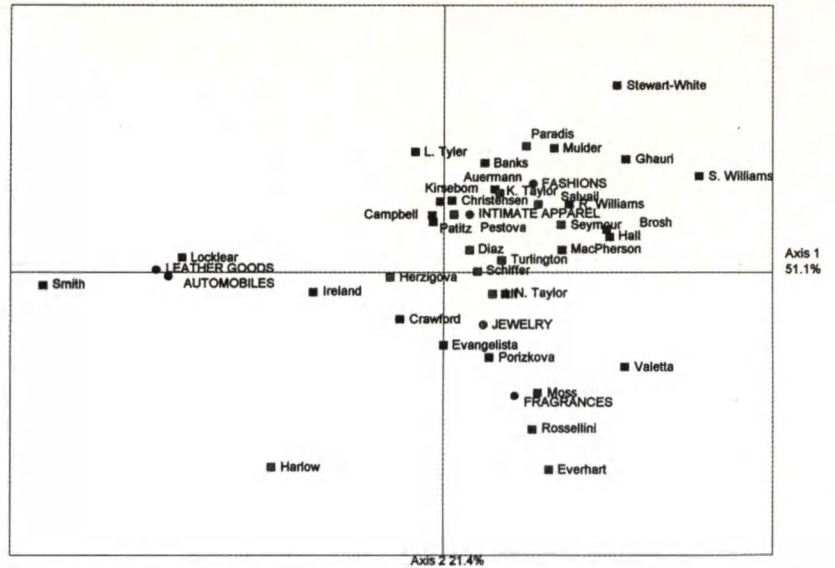
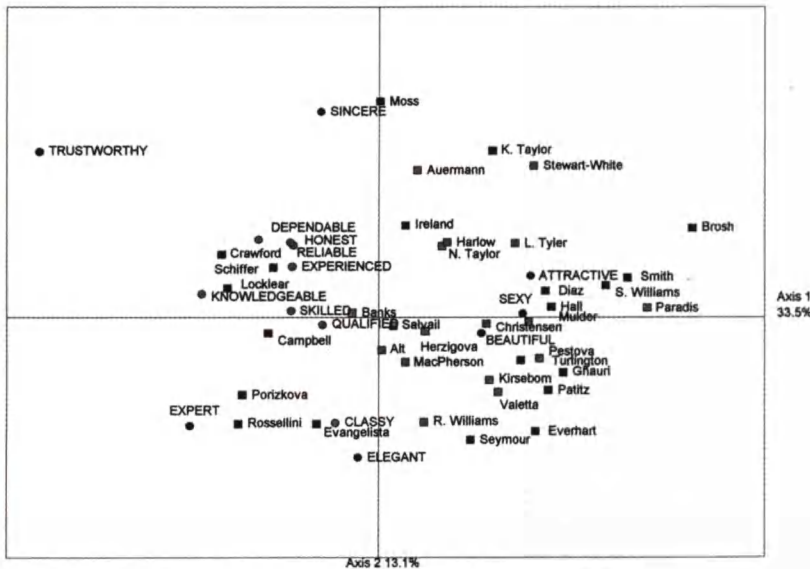


Figure 1: Perceptual Map of Supermodels' Images



analyzed in the light of sets of product categories associated with groupings of supermodels.

Super imagery

Two primary dimensions emerged in the correspondence analysis to portray the images of supermodels. The first dimension is that of "role," ranging from solely examples of beauty (e.g., Nina Brosh, Anna Nicole Smith, Stacey Williams and Vanessa Paradis) to competent, attractive women (e.g., Cindy Crawford, Heather Locklear, Isabella Rossellini and Paulina Porizkova).

The second dimension is that of "personality," ranging from positive inner traits, such as sincerity and dependability (e.g., Kate Moss, Niki Taylor, Nadja Auermann and Heather Stewart-Whyte) to interpersonal

styles, such as classy and elegant (e.g., Linda Evangelista, Stephanie Seymour and Rachel Williams). Image profiles for individual supermodels can be seen in Figure 1. For example, Helena Christensen personifies sexiness, Linda Evangelista symbolizes elegance, Heather Locklear is perceived as knowledgeable, and Kate Moss projects sincerity.

A second set of evaluations, supermodels as spokeswomen, is graphically shown in Figure 2. Products that supermodels might endorse were grouped into three sets: 1) clothing, 2) accessories, and 3) consumer durables. On ratings for presenting specific advertised products, Moss and Rossellini were viewed as best spokeswomen for fragrances; Linda Evangelista, Paulina Porizkova, and Carol Alt for jewelry; Tatjana Patitz and Helena Christensen for intimate apparel; Niki Taylor, Vendela Kirsebom, Tyra Banks, Nadja Auermann, Vanessa Paradis and Karen Mulder for fashions and Heather Locklear, Anna Nicole Smith and Kathy Ireland for leather goods and automobiles.

These choices of supermodel spokeswomen for specific products reflects, in part, their overall popularity. If we examine the average percentage given each supermodel across all 15 image attributes as an index of popularity, then Cindy Crawford, Heather Locklear, Naomi Campbell, Claudia Schiffer, and Isabella Rossellini top the list. □

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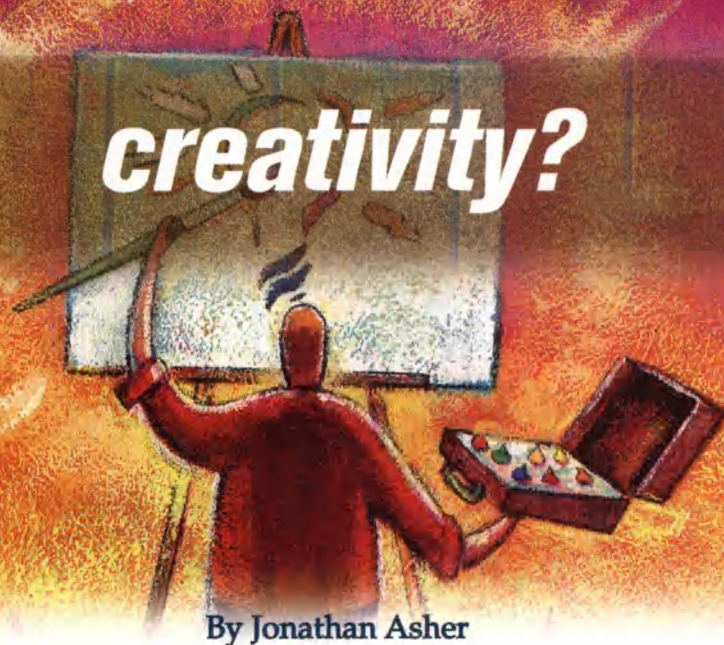
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Can we really measure

creativity?



By Jonathan Asher

Editor's note: Jonathan Asher is executive vice president and chief marketing officer of The Coleman Group, a New York City marketing design consulting firm.

Many clients seem to think that packaging research is unnecessary, that it's a time-consuming and expensive proposition that adds little to the creative process. But is that an accurate assessment?

Including research in a design project does add time to the overall schedule and dollars to the budget. However, it actually represents an investment that adds value to the creative process, provides input for decision-making and protects brand equity. So how best to go about it?

Pre-design research can be used to determine if it is even necessary or appropriate to institute a package redesign program. Then, should a redesign be called for, early research can uncover the important design components, the "design equities," associated with the brand.

This initial research phase will also gauge the extent to which a brand's perceived image fits the intended positioning strategy, and how the package contributes to or detracts from the desired image.

Overall, the intelligence gained from pre-design research helps set the design strategy, the specific guidelines that focus the designer's creativity, while still allowing room for artistic expression.

When pre-design research is not conducted, when design equities are not a concern, a during-design research phase is usually implemented using a range of preliminary designs as stimuli. This takes place in three instances: 1) when designing a brand new product; 2) when redesigning a package for which the equities are well understood; 3) when a dramatic change is needed and, in essence, there are no equities worth building on.

Finally, post-design research is conducted after the initial concepts have been refined and winnowed to several likely options. The learning obtained

from this research phase helps management make the final selection. Post-design research also provides insights that are useful for fine-tuning the selected design to optimize its effectiveness.

Some people refer to post-design research as an evaluation of the package which is conducted after the product has been introduced to the marketplace. While this approach can be useful, it is a more expensive proposition (assuming design modifications are required) than if the learning is obtained prior to the manufacturing process and market introduction.

Input from consumers

We have long embraced the use of packaging research because we recognize the value of input from target consumers. To determine which research techniques will be most useful for a particular design program, we sort through the various options and recommend the methodology most appropriate for the situation.

Take the case of Robitussin, a long-

time leading cough syrup, which over the years lost its strong identity through the addition of new formulas. Research revealed that the white Robitussin logo in a black box had high brand recognition and conveyed a quality image that could be transferred to other product categories. But severe communications problems were uncovered as consumers struggled to discern which type of product they were buying. Research guided the redesign effort which unified the brand line with a consistent landmark and packaging format.

We employ two proprietary techniques to assess brand identity and package design, in both the pre-design and the design concept stages. In pre-design research a chief goal is to uncover the strengths and weaknesses of an existing package relative to its competition. Information provided here can help determine if a redesign is in order and, if so, can provide guidelines, along with a thorough understanding of the design equities.

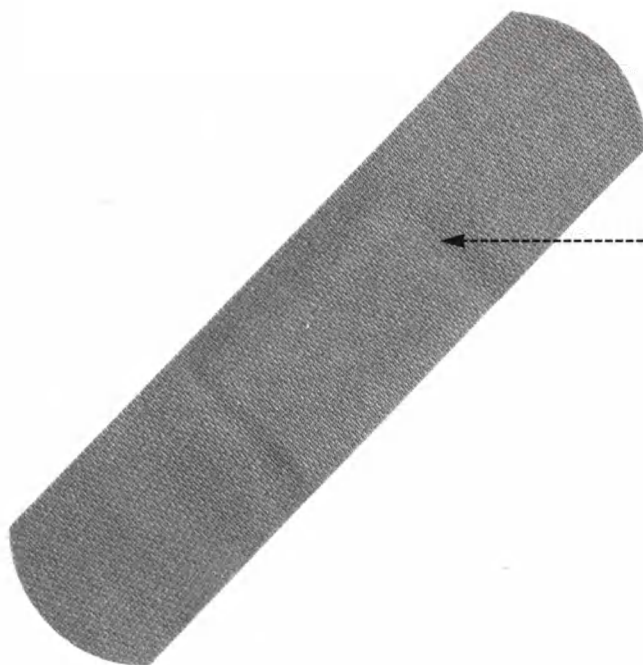
One of our processes is a pre-design system that includes quantitative research using eye-tracking to measure visual impact and label readability. By asking questions, with and without the package, we determine the contribution (positive or negative) the package makes to brand image.

Qualitative research techniques are employed to obtain consumer feedback to initial design concepts. By asking the right questions, and appropriately interpreting the results, one can apply the learning to the design phase. Often, final-phase design refinements begin shortly after the last focus group has been completed.

Focus group techniques are useful when the equities of an existing package are well understood and must be maintained, when the existing package has few graphic elements worth retaining, or in the case of a new product for which one has a blank slate on which to create a new identity.

Once the final design candidates have been narrowed to one or two, a post-design research phase, which can take many forms, is appropriate. With the concepts narrowed to a few candidates, and their designs well along in their development, post-design research can help brand management

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gain insights for refinements and make the final selection.

While many techniques can be employed, including focus groups, mall intercepts, T-scope, eye movement measurements and simulated shopping, research that will provide statistically reliable information and offer meaningful performance evaluations is most productive. This is best accomplished through a quantitative study of a sufficiently large sample for statistical testing and sub-group analysis. It also generally includes an eye-tracking procedure to yield shelf impact and label readability measures.

Research not always merited

Still, with all this said, one cannot always be a proponent of research. There are occasions when it is not merited. In one instance, a client had recently acquired a brand, and the management group lacked familiarity with its heritage and user profile, and planned a renewed marketing effort. Since we had grown up with this brand and were familiar with its package, we believed there was equity in the white

logo and blue background, and recommended retaining these elements.

We recommended a design phase with a broad range of concepts, including variations on the existing packaging theme. We also included designs a bit further afield, and subjected a representative range of these concepts to conceptual testing.

The research clearly revealed equity in the white logo and blue background. Further probing confirmed our fears that the label desperately needed upgrading. Even loyal users voiced sentiments about a "dusty" looking label and said they used the product despite its label. In the end, the new designs were well received, judged aesthetically appealing and the best reflection of the brand's quality heritage.

However, in many instances, too much of the decision making process is based solely on management judgment, even when research is included in the process. In one telling case, a client invested in an extensive quantitative research study, tested the designs that were closest to the current one and then maintained the existing logo. As a

result, they were able to evaluate the risk that might be created with making a change but never fully understood the opportunity they might have realized.

Measure effectiveness

So at the end of the day, can we really measure creativity? Perhaps not explicitly, but one can certainly measure the effectiveness of creativity and can use research to make the creative process more efficient. Perhaps the more telling question is, should we measure creativity?

The short-term view suggests not spending time and money on research given today's ever-shortening timelines and ever-tightening budgets. In other words, don't try to measure creativity. Make a judgment call.

But if you alienate your customer by making too great a change, or if you fail to thwart competitive threats because you didn't go far enough, you may endanger your brand's very survival.

Given those possible outcomes, the real question is, how can we not measure creativity? □

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What You Need To Know.

10 *research industry secrets* *and how to handle them*

By Vince Migliore

Editor's note: Vince Migliore is a market research consultant, doing business as AccuStat, Santa Clara, Calif. He can be reached at 408-356-1255 or at Tabulator@earthlink.net.

Even large firms nowadays don't have an in-house research department, choosing rather to farm out this function to vendors. But how much do you know about these research firms? What kinds of questions should you ask to find out more about the company that's processing your data? The following is a list of 10 industry secrets, including tips on how to handle them.

1. You may not need primary research.

Very often there is no need at all for primary research. Much of the information you require is readily available from secondary sources. It's usually free, or can be purchased for a fraction of the cost of conducting a survey.

An example: a small software company was enjoying rapid growth for its

product in a narrow niche market with only four other competitors. The company was a success even without a thorough understanding of its position in the industry, and it wanted to get market share and growth trend information. It was prepared to spend over \$20,000 for a telephone survey. Instead, we downloaded the sales and investor information of the four competitors from the Web, gathered data from the library, and made a call to an industry analyst for a major stock brokerage firm. The result: we had just about everything we needed for less than 10 hours of work.

The fix: Do your homework! In the Information Age, just about anything you need to know is available if you know where to look. Start by surfing the Internet. Get in touch with a good research librarian — they are worth their weight in gold. Many firms, such as DataQuest, Standard & Poors, or Dun & Bradstreet have huge resources that you can tap into for a relatively small fee. (Mention of firms and brand names should not be construed as an

endorsement of their products or services.)

2. Random selection? I don't think so!

The whole idea of conducting market research is to gather data that is representative of the entire population that you are targeting. This requires you to use a random sample, which by definition means every person has an equal chance of being selected. All too often the sample is composed of people who happen to be home when you call, or people who filled out their E-mail address, or some other convenience factor. Studies show, for example, that the first round of daytime calling of a random telephone list yields mostly retired people, students, and the unemployed. Is that your target audience?

There is also a popular trend called panel research, where the sample is composed of volunteers who agree to be called and surveyed over and over again. They are enticed to participate in surveys by the lure of cash awards, prizes, and a chance to express their

opinions. There are many instances where a panel sample is adequate and appropriate, but this selection method does not constitute a random sample.

The fix: Know how your sample is being drawn. If it's a telephone survey,

where did the list come from? Learn how many attempts are made to contact each person on the list. The more, the better. Selecting every nth name from a master list is a good way to generate a random sample.

3. You don't always get a representative sample.

Another tenet of research is that you want to be able to project the findings from the survey sample to the entire population. To accomplish this you need a representative sample, something you don't always achieve, even with a random sample. For some types of research, broad, ballpark measures are sufficient. The industry standard for most surveys, however, is to achieve a reliability of ± 5 percent at the 95 percent level of confidence. This is a technical way of saying if you did the same survey 100 times, using the same sampling method, that 95 times out of 100, the results would be within 5 percent of the "true" findings, which are those you would get if you surveyed everybody in the target audience.

The fix: Have a plan. Define your objectives. First, decide if you need a high level of accuracy. If you are simply trying to poll the general sentiments of your retail customers, then a small sample will often be adequate. On the other hand, if the purpose of your research is to make a multi-mil-

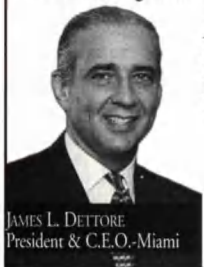
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lion dollar decision on corporate strategy, then you'd better have accurate results that can be projected to the entire population. To accomplish this task, you must start with a large and representative sample. Sampling is a complex subject, and the laws of probability dictate very specific minimum sample sizes. A rule of thumb, though, is that for target populations of 10,000 or more, you need a sample of at least 400 people. Further, to reach the level of reliability mentioned above, you need a random sample, or what's called a stratified probability sample. Finally, you must include techniques for verifying the sample reliability. To do that, include demographic questions that establish multiple profiles of those responding to the survey. For example, if you're conducting a general population survey, include age, gender, ethnicity, and ZIP code questions on the survey instrument, then compare your survey results to U.S. Census data. If you're surveying customers, and you know from sales data that 15 percent are in the education field, then your survey findings should reflect that.

4. Your questionnaire may be flawed.

Everyone has good intentions, but even a well-designed and easy-flowing questionnaire will often contain useless questions. "How many times have you gone to a movie theater this year?" "How many times did you go last year?" Such questions are fraught with problems. By "this year" do you mean the calendar year, or the last 12 months? If you get an average attendance of 4.2 times a year, does that convey any actionable response from your company, or are you simply going to use the results to classify your audience into high, medium, and low attenders? Can people really remember the number of movie visits they made a year ago? Finally, if you find average attendance is 4.2 times a year, does that really convey the full picture to you?

The fix: Study your questionnaire. A good way to check it is to write in the percentages that you expect to find. Then ask yourself what would happen if the survey responses were significantly higher or lower than what you expect. If there is nothing you could do

or would do about such surprise findings, then why ask the question?

Finally, give the survey to friends and relatives outside of work, and see if they can detect any biased or difficult

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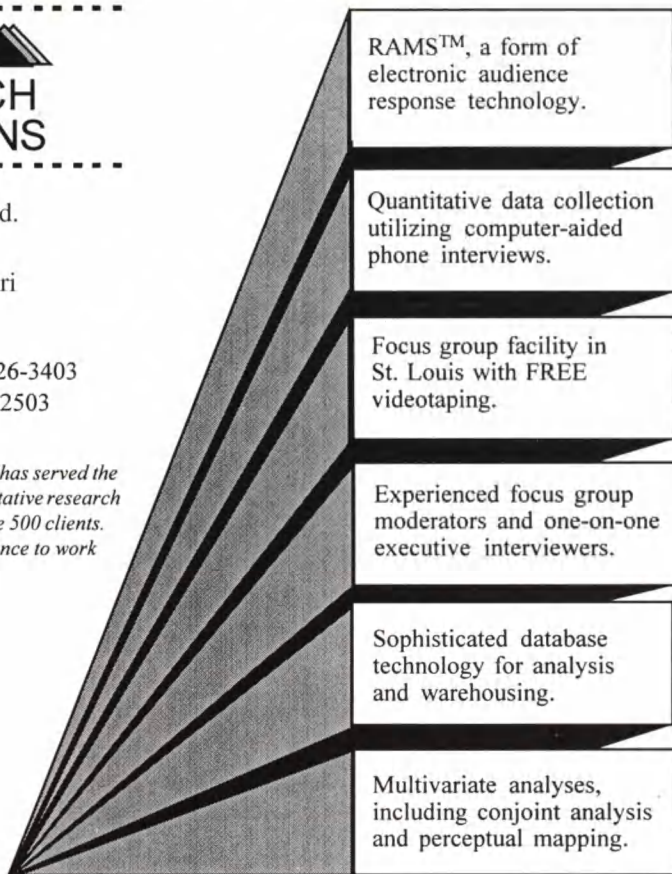
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interviewers that conduct your survey are likely the lowest paid employees in the field service. There is generally a high turnover rate in this business. For questionnaires with highly technical content, they will often not know what the questions mean.

The fix: Demand an orientation meeting and follow-up visits. Use these meetings to educate the interviewers and give background material on the purpose of the survey. Ask that the same interviewers be assigned for the duration of the project. Ask to monitor calls, and observe the interviewing process. Provide a glossary of terms and definitions. Provide cheat-sheets and reference material to answer the most frequently asked questions from the interviewers.

6. Our data entry is shaky.

As with interviewers, data entry clerks are often overworked. Besides keystroke errors, there are many transposition errors and missing data errors. For instance, there are 35 questions but only 34 entries, with the answer for question 21 placed in the slot reserved

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for question 20, etc. Most researchers will tell you that data integrity is the most daunting task in all of the research process.

The fix: Ask for involvement with and oversight of the data entry process. If you can afford it, double data entry with documented conflict resolution is the best bet. One of the better schemes I've seen is to assign a code for every variable, whether or not a response is required. For example, use negative numbers for non-responses: 1=Yes, 2=No, 3=Don't Know/Unsure, -1=Refusal, -2=No Response/Interviewer error, -3=No Response/Skip pattern, etc.

7. Crosstabulation tables are deceptive.

Crosstabulations have to be viewed with caution. Let's say you're crossing an important yes/no question by age groups, and the smallest age group has only 14 respondents. If four of those 14 say yes, then the corresponding percentage is 28.6 percent. Let's assume further that for the total population 12.3 percent of all respondents say yes to that question. It's easy to assume then that this age group is more than twice as likely to say yes. Not so fast! First of all, the 28.6 percent tenth-of-a-decimal-point format implies an accuracy level that is simply not justified by the number of cases it relies on. Second, the 28.6 percent is based on only four respondents, so you should suspect a reliability problem. Finally, many research firms supply crosstabulation and banner tables that do not show the statistical tests that would tell you the probability of these percentage differences being "real" or simply due to chance.

The fix: Study the total population frequencies before you order crosstabulation tables. If there are only 14 people in the youngest age group, 18- to 24-year-olds, then consider combining that group with the adjacent one, say 25- to 34-year-olds. By forcing larger numbers of respondents into fewer age groupings, you can increase the reliability of the percentages in those groups. Also, ask for the appropriate statistical tests with crosstabs. For category ques-

tions, use the Chi-square test, and for differences in averages on a scale, use the Student's T-test, or ANOVA. A good rule of thumb is that there should be at least five cases in the

smallest cell for the Chi-square test to be accurate. Last, use some common sense and good judgment when reviewing crosstabs. If the percentage of respondents saying yes goes up in a

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stepwise fashion as the age groups get older, then most likely the trend is real. If the age groups show only minor variations with no apparent pattern, then the differences are probably due to chance.

Here is a crosstab technique I've found useful. Make a copy of all the crosstabs that you can mark up. Flag those pages that contain the survey's crucial questions, like "Would you recommend our service to your friends?" Let's say 80.5 percent of all respondents say yes to that question. Now,

scan across the subgroup categories in the crosstabs and see which subgroups are higher than that 80.5 percent. If any of the subgroups is substantially higher, and has a good number of respondents, then highlight the percentage in yellow. These are your happy customers. If a subgroup shows a very high rating, say females at a 91.5 percent yes rating, and that 91.5 percent is higher than any of the other demographic subgroups (age, ZIP code, ethnicity, etc.), then highlight that percentage and also circle it with a red pen. Repeat that for all

the crucial survey questions. (Time consuming, yes, but this is why research analysts get the big bucks!) Now go back and count how many red circled percentages you find under gender, age, etc. If there are 10 red circles under male/female, and only one under ZIP code, then you know gender is more important than geography. Meanwhile, as you're busy highlighting, you can get a feel for how much variation there is in each subgroup, and how much is required to reach statistical significance in the Chi-square tests (if you've run them).

8. Sorry, we don't do that.

The standards in the market research industry are changing, and not everyone is keeping up. On-line and E-mail surveys are just a few recent examples. Many research firms have relied on telephone and personal interviewing, and have not acquired the skills needed for these new forms of research. Likewise, there are powerful and important statistical methods available that may be crucial to your project, but you won't hear about them because the company you're using doesn't have the software program, or the computer hardware, or the intellectual know-how to perform them.

Conjoint analysis is a great example. Here is a potent and decisive tool for deciding which new features your customers like best for improving your product. Conjoint analysis, though, requires a dedicated software program, computer-assisted interviewing, and lots of brain power in the planning and analysis stages.

The fix: Shop around, and again, do your homework. Read the trade journals for recent developments, and break out the old statistics text, to brush up on some of the less well-known statistical procedures. You should at least know the usage for these methods: Chi-square, Student's T-test, analysis of variance, factor analysis, and conjoint analysis. For Internet surveys, you should be able to define the following: Spam, HTML, CGI-bin, radio-button, forms-retrieval, and Web hosting.

9. Survey analysis is a voodoo science.

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size-fits-all method of survey analysis. Much of it is based on crosstabulations that are not always trustworthy, as we've seen above. Meanwhile, research companies like to convey the impression that they are experienced in your industry, but a good research analyst is rarely a subject matter expert. In order to get a meaningful report, you need an analyst who is intimately familiar with the strengths and weaknesses of statistical procedures, and who also has the ability to recognize which findings are significant to the survey objectives. This is a difficult task.

The fix: Use teamwork to bridge the knowledge gap. It's extremely rare that one person knows all the answers. Fortunately, most research projects are conducted in an atmosphere of cooperation and friendly interdependence. It may help to schedule a brainstorming session after the survey results are in, but before the report is written. As an example, the statistician may find that males over 40 rate your product significantly lower than other groups, but the industry analyst says, "We know that, it's the nature of our product, and we don't expect it to change." In other words, not all survey findings are important for strategic business decisions. Discernment in this area requires input from all players on the team.

10. Follow-up? Forget about it!

"Here's your report. Good-bye and good luck!" How many times do we hear that? All too often thousands of dollars are spent on a research project only to have the report sit on a shelf without an implementation plan. Just as likely, there is little review of the survey process, and no evaluation of the benefits it has provided.

The fix: Integrate the presentation of findings with a plan for implementation that conforms to the survey objectives. Instead of one presentation event, plan on a multi-step process of disseminating and evangelizing the survey findings. Fortunately there are usually several key players in your firm who will appreciate and champion the project suggestions. Use them. Meanwhile, mark your cal-

endar for a day about six months down the road, where you take some time for an objective review of the survey. Did it help business? Did it provide key insights? Would you use this research firm again?

These are just 10 of the many problems that arise in the research industry. I'm sure you can think of others. Please feel free to E-mail me at Tabulator@earthlink.net with your own experiences. □

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Lottery

continued from p. 19

long because he won the Big Game, was presented in the original focus groups. We knew we were really onto something."

The second spot, "Lockstep," features the same kindly gentleman watching each of his neighbors trudge off to work in the morning in tandem as he again sits on a lawn chair and watches them go by.

"We really made sure we were conveying simplicity and relaxation to their utmost by really paying attention to the details," Blum says. "The man has a modest house in a modest neighborhood. The consumer clearly

told us it simply isn't about money and all the things you can buy these days."

The final pieces

In order to ensure the advertising was going to deliver the appropriate message, mall intercepts were held throughout Maryland before airing the spots.

Additionally, other media were employed to deliver the secondary messages, such as "The Big Game is so big, there are nine ways to win and over 30,000 Marylanders win something each week." Initial awareness tracking indicates outstanding proven recall scores for the campaign after just one flight. □



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Survey Monitor

continued from p. 6

Corp. missed the cut following the end of its commitment to the Atlanta

Olympics.

Given the rise in the number of blockbuster sports deals, the sports category will increase its share of total 1998 sponsorship revenue to 67 percent. That 2-point gain comes at the

expense of entertainment tours and attractions, which will lose one point of market share, slipping to 10 percent, and causes, whose share will erode for the first time, sliding from 9 percent to 8 percent. The festivals, fairs and annual events category maintains its 9 percent share, while the arts hold steady at 6 percent.

Forecasted dollar figures for the five categories are: sports, \$4.55 billion; entertainment tours and attractions, \$675 million; festivals, fairs and annual celebrations, \$578 million; causes, \$454 million; and the arts, \$413 million. For more information call 312-944-1727 or visit the company's Web site at <http://www.sponsorship.com>.

Consumers ready to pay for high-speed Internet access

A study by The Strategis Group, Washington, D.C., "High Speed Internet Access. A Consumer Demand Study," found that one in five U.S. homes will subscribe to high-speed Internet service for at least \$40 a month when it becomes available. "Over 40 percent of current on-line users will pay \$40 a month for high-speed Internet access, while most non-on-line homes will wait for prices to decline and for more compelling content to emerge," says Samuel Book, president of consumer research at The Strategis Group.

The national survey of 500 U.S. households reveals that residential on-line/Internet subscribers spend about six hours per week on the Internet, including four hours a week on the World Wide Web and on-line information services. The typical on-line household sends and receives nine E-mail messages a week.

On-line households in the U.S. have mushroomed from under five million two years ago to over 17 million today. But higher speed is needed for mass market usage, and the next stage of Internet evolution depends on high speed broadband networks.

Fewer than 150,000 homes were estimated to subscribe to high-speed services by the end of 1997. As high-

1997 U.S. Sponsorship Leaders

\$142 million to \$145 million

Philip Morris Cos., where Kraft Foods, Inc. and Miller Brewing accounted for the increase in spending.

\$130 million to \$135 million

Anheuser-Busch Cos., which signed new deals with the WNBA and U.S. Skiing, as well as a number of renewals.

\$110 million to \$115 million

The Coca-Cola Co., which renewed for TOP IV (TOP, or The Olympic Program, is a sponsorship program run by the International Olympic Committee joint-marketing program) and added other international deals.

\$90 million to \$95 million

General Motors Corp., which, in addition to its blockbuster USOC and Salt Lake City Winter Olympics deals, increased spending across the board.

\$75 million to \$80 million

PepsiCo, Inc., whose PepsiCola aggressively pursued deals in soccer and other international sports, long a stronghold of rival Coke.

\$60 million to \$65 million

Nike, Inc., which makes the largest leap and overtakes seven companies to become the sixth-largest spender. The company's stunning eight-year, \$120 million U.S. Soccer agreement was its most significant deal.

\$55 million to \$60 million

AT&T, which held the line on spending, signing some new deals but trimming local and regional activity.

Eastman Kodak Co., which signed new deals from the present marketing department it established in December '96.

\$45 million to \$50 million

Chrysler Corp., which expanded its portfolio into venue and arts sponsorships.

RJR Nabisco Inc., which continued to see increases from its food brands.

McDonald's Corp., which took

its first TOP sponsorship.

IBM Corp., which did not sign any major new deals.

\$40 million to \$45 million

Sprint Corp., which added the Rolling Stones tour.

Visa Int'l., which continued to tie into destinations and signed with USA Hockey to augment its TOP sponsorship.

\$35 million to \$40 million

MasterCard Int'l., Inc., which signed with Major League Baseball.

The Quaker Oats Co.

\$30 million to \$35 million

Du Pont Co., which did not significantly increase spending for the fourth year in a row.

\$25 million to \$30 million

Ford Motor Co., which passes four companies on the strength of its title sponsorship of performing arts centers in New York and Chicago, plus other deals.

\$20 million to \$25 million

MCI Telecommunications Corp.

Sara Lee Corp., which dropped the TOP program.

John Hancock Financial Services, which signed for TOP IV.

Procter & Gamble Co., American Airlines, Inc., neither of which signed any significant new deals.

\$15 million to \$20 million

Reebok Int'l. Ltd., which added the WNBA and University of Virginia to its roster.

Motorola Inc., which dropped cycling and the Olympics, but picked up auto racing deals and kept spending level with '96.

Texaco, Inc., which signed a new Olympics deal and added sponsorships targeted to minorities.

Delta Airlines, Inc., which dropped down the list due to the end of its Olympics contract.

BellSouth Corp., which increased spending despite expiration of its Olympics relationship.

Xerox Corp., which resigned for TOP IV.

Pennzoil Co.

Coors Brewing Co., which heightened its profile in music.

United Airlines, Inc.

Shell Oil Co.

Mobil; Nestlé USA, Inc.

Dayton Hudson

Hewlett-Packard Co.

UST, Inc.

\$10 million to \$15 million

The Home Depot, Inc., which added its name to the title of the Senior PGA Tour stop in Charlotte to its Olympic deals.

Time Warner, Inc., which signed a TOP IV deal.

The Gillette Co.

Sears, Roebuck & Co., which signed with the WNBA;

MBNA Corp.

United Parcel Service of America, Inc., which contracted for TOP IV.

Bausch & Lomb, Inc., which ended its TOP sponsorship.

The Chase Manhattan Bank, which boosted its tennis ties.

Mars Inc.

Microsoft Corp., which added ties for its Interactive Media Group.

General Mills, Inc., which entered a new USOC deal.

American Express Co., which dropped its Share Our Strength tie, but added mall deals.

FedEx; York Int'l. Corp.

LCI; Thomson Consumer Electronics, Inc.

Nissan Motor Corp. U.S.A., which reduced spending.

Dean Witter

Hooters of America, Inc.

All figures are fees paid for sponsorship rights. They do not include additional expenditures for advertising, promotion and client entertainment, nor do they include philanthropic contributions.

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speed platforms come on line, especially from cable and telephone companies, pent-up consumer demand for higher speed will result in accelerated growth of high-speed Internet households. The study forecasts nearly eight million high-speed Internet homes in 2001, with high-speed Internet subscription revenues approaching \$4 billion. For more information call Melani Abarro at 202-530-7500.

The wide world of women's sports

In sports, American women are no longer content to sit on the sidelines

Manufacturers Association (SGMA), women are actively involved in a wide range of endeavors — especially fitness activities (see tables).

This information was abstracted from a study conducted by American Sports Data, Inc. This study is prepared annually for the Sporting Goods Manufacturers Association and tracks participation in 62 different sports and activities. SGMA is a trade association of North American manufacturers, producers, and distributors of sports apparel, athletic footwear, and sporting goods equipment, is dedicated to increasing participation in sports and fostering industry growth and vitality. For more information call 561-842-4100.

Consumers prefer snail mail to E-mail

A survey commissioned by Pitney Bowes Mailing Systems and conducted by NFO Research, Inc., Greenwich, Conn., found mail (first-class and standard) to be the most preferred, most secure and least intrusive communication method of consumers when receiving daily messages in their home. The survey revealed that, on average, Americans prefer to receive everything from bills and personal correspondence to catalogues and promotional material via mail.

The survey asked U.S. consumers to rank five communications tools by preference when receiving common communications including: bills and invoices; brochures; personal correspondence; business

Sports Most Popular With Women Based on "Frequent" Participation (Age 6 and older; U.S. Population)	
Sport	1996 (000)
1. Fitness Walking (100+ days/year)	9,889
2. Exercise to Music (100+ days/year)	4,862
3. Treadmill (100+ days/year)	4,569
4. Inline Skating (25+ days/year)	4,361
5. Stationary Bike (100+ days/year)	4,074
6. Bowling (25+ days/year)	4,069
7. Running/Jogging (100+ days/year)	3,799
8. Slowpitch Softball (25+ days/year)	3,603
9. RV Camping (15+ days/year)	3,210
10. Volleyball [Hard Surface/Grass] (25+ days/year)	3,101

and cheer. They want to be a part of the action — crossing the finish line, swinging for the fences, serving aces, and pumping iron.

According to a recent sports participation study by the Sporting Goods

method of consumers when receiving daily messages in their home. The survey revealed that, on average, Americans prefer to receive everything from bills and personal correspondence to cata-

Fastest Growing Sports For Women Based on "Frequent" Participation (Age 6 or older; U. S. Population)			
Sport	1996 (000)	1992 (000)	% Change
1. Inline Skating (25+ days/year)	4,361	856	409.5%
2. Treadmill (100+ days/year)	4,569	1,451	214.9%
3. Billiards/Pool ('96 25+ days; '92 52+ days/year)	2,730	1,201	127.3%
4. Resistance Machine (100+ days/year)	2,386	1,226	94.6%
5. Multipurpose Home Gym (100+ days/year)	902	502	79.7%
6. Aerobics [Step] (100+ days/year)	1,836	1,115	64.7%
7. Basketball (52+ days/year)	2,541	1,775	43.2%
8. Running/Jogging (100+ days/year)	3,799	2,825	34.5%
9. Camping [Tent] (15+ days/year)	1,660	1,236	34.3%
10. Exercise to Music (100+ days/year)	4,862	4,012	21.1%

correspondence; newsletters; catalogues; and marketing, advertising and promotional information. The tools ranked were first-class mail, standard mail (formerly known as third-class mail), overnight delivery, fax and E-mail. When asked which delivery method is most preferred, first-class mail received the highest score when rating bills and invoices (88.5 percent), personal (81.2 percent) and business (71.8 percent) correspondence. Consumers also felt that, based on the level of importance, brochures, catalogues and marketing materials would be better received via standard mail, with first-class mail ranking second.

Security and degree of intrusion were also ranked by consumers. First-class mail consistently ranked as both the most secure (confidence that the message will be delivered correctly and privately) and the least intrusive (offering recipients the most control over when the communication is actually received, opened and read) method in receiving communication. Overnight delivery ranked second as both the most secure and least intrusive.

Overall, consumers ranked E-mail the least preferred method of receipt. It was also considered the least secure method, even by consumers with an Internet/E-mail address, and was ranked one of the most intrusive for all messages received. Mail was consistently rated better than E-mail across all age groups, income categories and geographic locations. Thirty-six percent of respondents reported they had an Internet or E-mail address.

The survey was conducted through a mail-in study, which generated responses from 1,323 adult consumers in the U.S. The margin of error associated with the entire sample is ± 2.7 percent at the 95 percent confidence level.

Benefits crucial to Hispanic job hunters

A recent issue of *Hispanic Perspective*, a newsletter from Market Development, Inc. (MDI), San Diego, Calif., reports that more than a flexible schedule or a high income, Hispanics want a job that provides them with

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health insurance and other benefits.

“Good health and other employee benefits” ranked number one among eight job-related benefits evaluated by 300 Hispanic adults interviewed by MDI in the five major Hispanic mar-

income.”

Hispanics tend to have bigger families and, therefore, a greater concern with being able to provide health care for more members of their family. But these findings also suggest that U.S.

Hispanics have a genuine interest in securing their family’s well being and, accordingly, look for jobs that offer a long-term commitment with an employer.

Clearly, among Hispanics, keeping a job, particularly one which offers opportunities for advancement, is a guarantee of a good future, which is why job security has a higher priority than a high income. Hispanics aim at establishing loyalty

within the global marketplace.

For foreign-born Hispanics, holding on to one job for long periods of time — even a lifetime — is a pattern performed in their countries of origin. Low job turnover makes changing jobs and/or relocation very unusual occurrences in Latin America.

Other findings included that while lower-income households placed getting benefits on top of their importance list, higher-income households placed more importance on other issues such as job security and opportunities for advancement.

All job attributes were considered important for more than half of Hispanics. Overall, older Hispanics seem to place more importance on these eight attributes compared to younger ones. They also consider proximity to the job site and a pleasant environment more crucial than their younger counterparts, suggesting a set of job expectations more geared towards convenience and congeniality. For more information call 619-232-5628.

kets. For U.S. and foreign-born Hispanics alike, “opportunities for advancement” and “job security” came next in importance, well above “high

first and then seek compensation, rather than getting to the compensation first and then deciding whether loyalty is merited, a more prevalent attitude

Overall Importance of Job Benefits (%)

Good benefits	89
Opportunities	87
Job security	87
A high income	76
Good reputation	76
Close-by	66
A fun environment	60
Flexible hours	56

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Data Use

continued from p. 15

team at DBMS/COPY has had to crack the code themselves.) Those of you who are not familiar with, or are rusty about, the notion of value labels will find a description in the chart on page 15. Mavens can skip this explanation, but miss a couple of awful jokes.

Also, DBMS/COPY cannot handle ASCII files where the records vary in the number of "cards" or lines of data. This trick is fairly difficult, though, and fortunately, the need only rarely arises — but still it would be a useful feature to have.

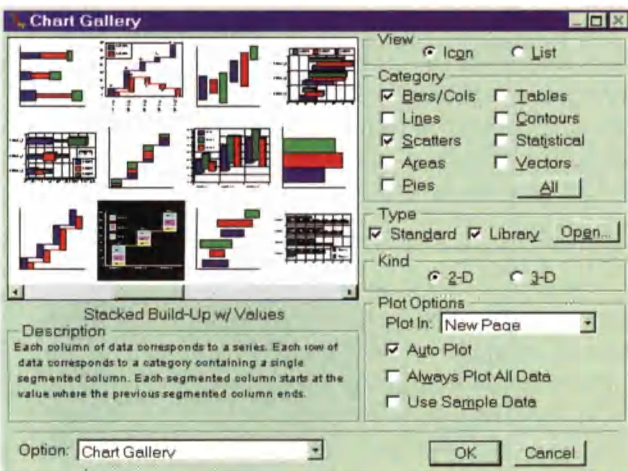
If you need real "connectivity," or file translation power, you will find DBMS/COPY one of the great software bargains of our time, at \$295. You can get more information about this program at the SPSS Web site (www.spss.com), or directly from the manufacturer, Conceptual Software.

DeltaGraph 4.0

This program provides charting and graphing power of the highest order. It has the best mix of simplicity of use, chart customization, and depth of features of any charting/graphics package I have encountered. DeltaGraph has a long history on the Macintosh, and now in its Version 4.0 series (the current release is 4.04) has become fully compatible with Windows 95.

Even though programs like Excel, Harvard Graphics, and Lotus Freelance — and SPSS itself — have strongly improved charting abilities, DeltaGraph has stayed several steps ahead. It offers so many different chart types — grouped into "galleries" — that just browsing through its offerings may give you new ideas about ways to display data.

Figure 1 shows a small sample from the chart gallery. In addition to providing many preset graph types, the program



allows you to customize nearly anything on a chart, and then save the result in the gallery. This is definitely the program to have if you need everything "just so," down to the size and placement of the tick marks at the border of the

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chart.

Among the many nice features of this program, one that your author probably likes best is its ability to make scatterplot diagrams with labels next to the points. This feature works quite handily with the various types of perceptual maps (whether actually from discriminant analysis, correspondence analysis, or whatever). You just put in the coordinates and the labels, and the program does nearly all the terrible plotting work you once had to do by hand. You will have to nudge some of the labels if the chart is crowded, but the program makes this type of on-screen editing quite simple.

Other useful charts rarely seen elsewhere include "x-y bars" and "bubble charts." In x-y bars the widths represent one series of numbers, and the heights another. For instance, you can make the widths of the bars represent the sizes of groups being analyzed, and the heights represent market shares among those groups. Unlike a simple bar chart, this can give you a quick visual impression of how much, for example, total sales volume goes into each group. (In the example here, the area of each bar — height times width — would show the proportion of volume accounted for by the group.) Bubble charts are useful because they can show both an "x-y" position for a point and represent, for instance, its importance by its size. This can add very nicely to several types of maps.

DeltaGraph has many analytical extra features, some of which have become more or less expected of a charting package. For instance, it can calculate and plot regression

lines and fit various types of curves (power, exponential, logarithmic, etc.), and calculate new data with built-in formulas. More advanced features include the ability to add "error bars" to exact specifications (for instance, at 1.5 standard deviations around plotted points in either or both directions, if you wish), and an editor specifically for equations.

You can make a sort of a slide show with DeltaGraph alone, but I prefer to use it as a supplement to programs like PowerPoint or Excel, when they do not have enough charting power. Charts from DeltaGraph paste very nicely into these applications as "enhanced metafiles" which print at the best resolution your printer can offer. The charts also can be "ungrouped," and edited one element at a time, in PowerPoint and several other programs. DeltaGraph is particularly useful as an adjunct to these programs in part because, unlike them, DeltaGraph does not think it knows better than you when it comes to labeling. On bar charts in particular, DeltaGraph will include all the labels you request, and not skip some to satisfy its own sense of aesthetics.

Of course, Delta Graph can make all sorts of astonishing, and sometimes mind-boggling, charts with 3-D and 3-D effects. Unfortunately, while these seem incredibly interesting in the making, many audiences do not find them much fun, or highly comprehensible. It may take a little experience with a program this powerful to realize what an invitation it offers to overdo your charts.

There are only a few features on your author's wish list for DeltaGraph. Salient among these is the inclusion of a "recently used file" list on the file menu. Nearly all Windows programs now have this feature, and it certainly can be very handy in opening and editing recent work.

Also, it would add to the program if the user could control the placement of labels on bar charts more closely. Now you have some general options like "inside," "at end" or "outside." The ability to specify labels' distances from the ends of bars would help. At the least, the program would work better if it made sure labels fell beyond the ends of 3-D bars, when you ask for them to go "outside."

Some of DeltaGraph's charting power has found its way into the newest release of SPSS, but even so you likely will find this a remarkably versatile and useful piece of software. It packs a tremendous amount of charting power, regardless of price — and at \$295 looks like another exceptional value for the money.

SPSS Diamond

Diamond is the most unusual of the programs discussed here. Its data visualization and exploration tools not only are unique, but they also can prompt you to think about patterns in data in new ways. It comes from impressive original work on data visualization done at IBM's impressive-sounding T.J. Watson

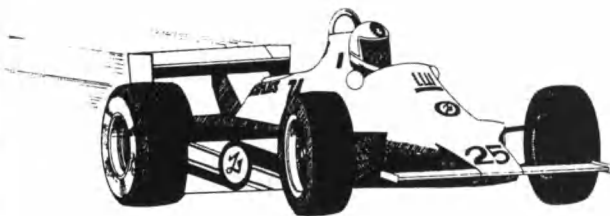


Research Center. It makes heavy use of color to define patterns in data, and uses some display methods that likely are not familiar even to advanced data analysts. At the same

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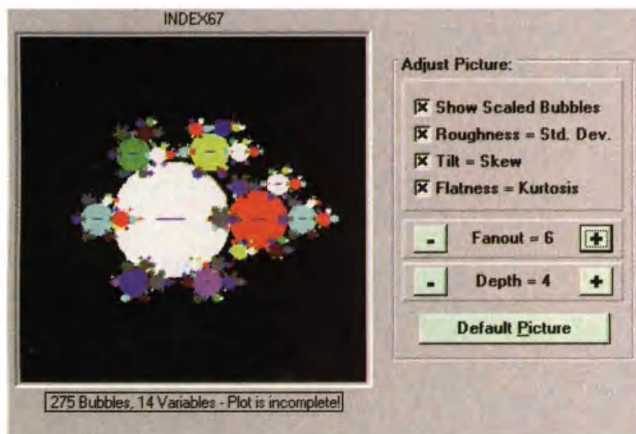
time, though, Diamond still seems to need somewhat more work to reach its full potential than the other programs reviewed here.

Let's start with what Diamond can do, and then move on to the assorted wishes for, and scattered complaints about, its operations. Just the list of Diamond's capabilities looks highly intriguing. These features include:

- Parametric snake plots
- Quadwise plots
- Parallel coordinates plot
- Triplewise plots (3-D scatterplots)
- Fractal foam plots
- Numerous univariate statistics
- Numerous bivariate statistics
- Best fit lines with "goodness-of-fit" thresholds for display

Let's first briefly describe some of these display methods. Perhaps most intriguing, in name if nothing else, are fractal foam plots. This type of plot shows a special pictorial view of a bivariate correlation matrix. You first choose a variable to become the focus of the chart. This variable then is plotted as a large bubble at the center of the map, with other variables in the analysis mapped around its perimeter. The diameter of each bubble around the focus variable is proportional to the strength of their correlation. The shape and orientation of each bubble (i.e., its roughness, tilt, and flatness) also can be used to represent univariate statistics (skewness, kurtosis, and standard deviation) for each variable.

This plot allows you to view large numbers of correlations quickly, and to see how variables cluster together. You can use these plots to check assumptions, and to reduce data before doing statistical tests or procedures. Fractal foam plots can reveal several possible problems in a data set, such as multicollinearity, violations of assumptions of normality, or correlation structures in the data set that do not work well with a particular type of model. Figure 2 shows you a sample of a fractal foam plot. Labels for the variables clustered around the focus appear only in



a space below the diagram as you move the mouse pointer across them — as will be discussed shortly.

Parametric snake plots extend standard scatterplots. In them, the points in the scatterplot are connected in the order

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of another variable. For instance, you can connect the scatter points in order of a time variable. This allows you to see how relationships between two variables develop with respect to the third.

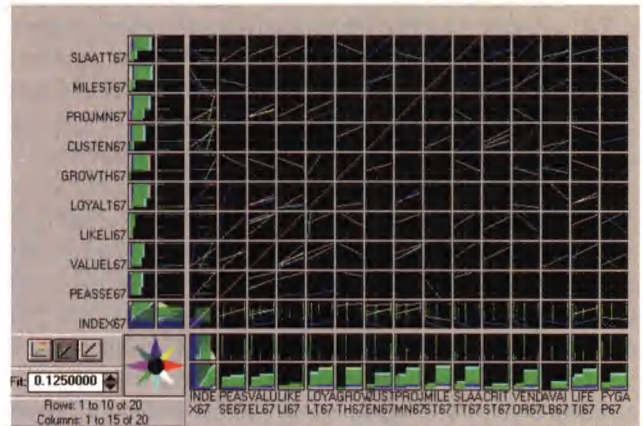
Quadwise plots give a view of any two scatterplots with linked lines drawn between corresponding points. They therefore show the relationships between two pairs of variables. This can provide extra analytical power when used with Diamond's flexibility in assigning colors to data based on the numerical range in which the data falls, and in making subsets of data based on these colors.

Parallel coordinates plots look at the relationships across many variables at once. Each variable is plotted on a vertical axis with lines connecting points, case by case. Again, these plots can work by color-coded group. You can sort and rearrange the axes interactively.

Triplewise plots (3-D scatterplots) give a 3-D view of a scatterplot of three variables in a transparent cube. You can animate the display, making it spin and tilt in any direction.

Other capabilities include numerous summary displays, most notably in the program's Directory window. This window (which needs a more descriptive name) holds a matrix of scatter plots in which each variable is plotted against every other variable. Histograms and cumulative histograms for each variable also appear. You have the option of adding best-fit lines, which you can draw according to an adjustable goodness-of-fit threshold. (For instance, the lines can be set to appear only for variable pairs with an *r*-value of greater than 0.25.) You can sort the plots, and

scroll through them. The large device in the lower corner of Figure 3 controls the scrolling.



Note how the color-coding works on the slopes of the best-fit lines, as well as on the variables displayed themselves. This feature can quickly show the relationships among large sets of variables. This directory window by itself is practically worth the price of admission for the entire program.

Now we move on to your author's wish (and complaint) list for Diamond, one that's longer than comparable sections for the other products reviewed. While it should appeal to fans of grouching and random criticism, I approach it with mild trepidation. I hope that SPSS will continue developing this program into the remarkable analytical tool



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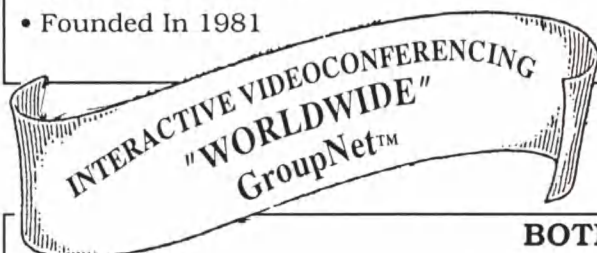
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it can become, even though a fair amount of work remains.

Perhaps most vexing are Diamond's limitations in formatting and modifying output. Most of the displays are strictly fixed in size, and do not fully use the screen at 1,024 by 768 resolution (which is fairly standard for Windows). You cannot zoom in on most of the displays. For instance, the "Directory" window shown in Figure 3 cannot be modified, except for changing the color-coding, or scrolling or sorting the pre-sized rows and columns. In the "fractal foam" display, your only way to find what the bubbles represent is running the mouse across them. You cannot even put labels onto the largest bubbles in the display screen. In addition, you cannot zoom in on this display — a feature it seems to beg to have. It eludes me how this display could get into a report, or a presentation, in an intelligible form — without forcing the user to scratch out labels with a pencil and paper, then apply them with another program.

Unfortunately, the "gee-whiz" aspect of the displays does not carry over well from the screen to paper. Saving the displays in the only format available (standard Windows metafiles, apparently) did not produce high-resolution output, but rather was limited to the pixels (dots) in the rather small display windows. The saved images did not come out in color, in spite of their huge file sizes (the directory window file ran to some 1.3MB). The pictures from Diamond in this review in fact were "finessed," using a dedicated screen-capture application.

For such a visually oriented program, Diamond relies

heavily on use of the manual to explain what it does and how. Unusual for SPSS, the manual was fairly diffuse. Pointers for practical applications for the program are scarce. Worse, the authors drag out the dreaded "Fisher's Iris" example, which must be nearing its 70th birthday, and seems to show as little as possible about what you can do with any modern analytical procedure.

In sum, Diamond is an intriguing application, but needs more work in customizing its data presentation and in its on-screen controls. It likely would be of most interest to you if your goals center on looking at data and understanding it yourself — rather than on presenting your insights to others. This is unfortunate, because as we look at messier data sources, such as customer databases, we always need new and more powerful methods to find and display hidden patterns. With a little more work, Diamond could provide some of the needed tools.

SPSS prices Diamond like its options, meaning that it could cost less if you already have other options, or if you buy others at the same time. If you use SPSS, you should call your SPSS representative to determine the price. As a stand-alone product, Diamond costs \$395.

SYSTAT Version 7

SYSTAT and SPSS, for years major competitors, now have joined forces. These two general purpose statistical packages now share a common manufacturer, and have been brought more



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closely in line in file handling and overall appearance. This gives rise to two key, and highly related, questions about SYSTAT. First, if you already own SPSS, do you need SYSTAT? Second, if you don't own SPSS, could you use SYSTAT as your only statistical package?

We'll start with the first question. What does SYSTAT add to the analytical power you already may have in SPSS? After all, if you have the SPSS base product, and a few of the optional modules, you may feel that you have covered all the analytical areas you ever will need to. You may believe that SYSTAT offers largely the same things as those you have. Perhaps SPSS, Inc. plays into this perception somewhat by labeling SYSTAT a "scientific" product, keeping it separate from the "SPSS family." (That is, they seem to suggest something along the lines of, "It's really like SPSS, but just for people calling themselves scientists.")

While these two programs overlap in many of the basics, SYSTAT provides a wealth of analytical methods that add to those in SPSS. These programs in fact complement each other, in spite of the inevitable duplication involved in each offering a full set of statistical procedures.

The "new feature" list for SYSTAT Version 7.0 will reveal most, but not all, of the important differences between SYSTAT and SPSS. Several of these "new features" will be familiar to some readers as former extra-cost options in earlier versions of SYSTAT. Whatever their provenance, these include some major additions. Here's the list first, then a brief discussion of some of the procedures

likely to be of more interest.

SYSTAT Version 7.0 major new features:

- Bootstrapping
- Probit
- Classification and regression trees
- Test item analysis
- Conjoint analysis
- Set and canonical correlations
- Correspondence analysis
- Signal detection analysis
- Logistic regression
- Survival analysis
- Partially ordered sets
- Two stage least squares
- Perceptual mapping

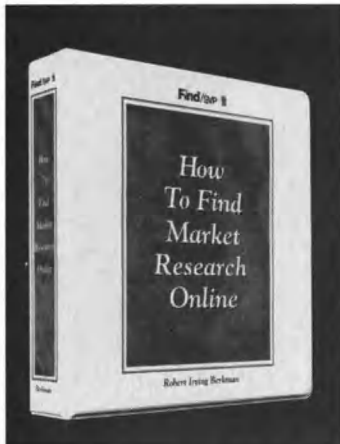
Bootstrapping is not actually a "module" in SYSTAT. Rather it is a procedure available to use in nearly all the other modules. It allows you to estimate errors in coefficients and other measures that you otherwise could not. Or, as the SYSTAT manual states it, it produces "estimates of parameters in samples taken from unknown probability distributions." (And of course, there are no questions about this, class, are there?)

Most notably, bootstrapping can provide the standard errors of coefficients from multinomial logistic regression. This makes bootstrapping a very useful option for analyzing discrete choice modeling problems. (For the more sta-

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tistically inclined readers, bootstrapping works better than the [perhaps] more familiar Wald tests for the coefficients of nonlinear models.) You also can use bootstrapping to estimate the standard errors of medians, the standard errors of Spearman correlations, and the standard errors of regression coefficients where predictors are highly intercorrelated. Bootstrapping as implemented by SYSTAT actually includes three related estimating procedures, more correctly called jackknife, simple replacement, and (finally) bootstrap. These procedures determine errors empirically, with calculations based on drawing many subsamples or subsets from the data set. Since you run bootstrapping procedures hundreds, or thousands, of times to get the required estimates, plan to leave a little extra time for it. You probably will want to wait until just before lunch — or better, a few minutes before quitting time — to turn the computer loose on this type of problem, then check back later. (Two or three years from now, though — if computers continue increasing speed as they have — you probably will get this all done while you have a cup of coffee.)

Logistic regression is perhaps the biggest bonus of all “new” SYSTAT modules. This is an update of a formerly extra-cost module (called “Logit”). With this module, you can easily and efficiently do nearly all the analysis needed for discrete choice modeling. No other widely available program now offers a dedicated module designed to do this form of analysis. (I would like to note here that you can force or trick SAS into doing the required analysis, and the SAS Institute Web site provides some remarkable papers by Warren Kuhfeld showing exactly what you need to do. Also, when I stated in an earlier review that SPSS could not do the required multinomial logit analysis, a Very Alert Reader [Keith Crum of IntelliQuest] quickly pointed out that you can in fact cajole the SPSS Cox-Regression procedure to give you an answer in a similar way. For most readers, though, this definitely will remain Something Not to Try at Home, especially because SPSS does not offer program-specific guidelines like the ones from SAS.) Finally, Sawtooth Software also offers the CBC program, which is an all-in-one type of solution, handling everything from setting up the problem to gathering the data and doing the analysis. CBC, though, has a serious limitation in that you cannot analyze any product with more than six attributes. Also, you need to accept CBC’s underlying analytical model, in which brand is treated as an attribute. Some users may not care for this lack of flexibility.

In any event, you can analyze discrete choice modeling problems directly with the SYSTAT logistic regression module. You can handle multinomial logit and related modeling procedures of very large size — so you do not need to worry about running up against limitations in the number of attributes, levels or choices you test. SPSS has trapped and resolved a few bugs that sometimes emerged in earlier versions of this module, and it now appears to run perfectly well.

I have only a few scattered wishes for this module. Principally among these, it does not directly support testing for “Independence of Irrelevant Alternatives” (or IIA).



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Multinomial logit (and related methods) require that this assumption not be violated, to produce reliable estimates. Doing this type of testing without any automation in the program is both time-consuming and difficult. (Here is a place where I would very much like an Alert Reader to write in with a simple solution.) Fortunately, IIA rarely gets violated in real-world applications, though. The absence of this feature, then, while regrettable, will not critically injure most analyses.

Another wish concerns the manual itself. Uncharacteristically for SYSTAT, the manual seems a little diffuse. Even very experienced readers may find the descriptions somewhat unclear, in terms of what you need to do to structure the data for each of the logit variations. The manual really needs very explicit instructions, in brief (even bulleted) form, on how to make sure the data is set up properly. You can figure this out with some experimentation now, but the manual could go further in explaining this key area. Also, you will find no discussion that helps in setting up and using the procedure as it is most often applied in marketing and market research.

Doing market-share simulations remains time-consuming and cumbersome. You are really better off building your own simulator that makes use of the output, or finding somebody who knows how to do this.

In spite of these reservations, this module can truly add crucial analytical power to the procedure you can find in SPSS and other widely available PC-based packages.

Classification and Regression Trees also is an update of

another former extra-cost SYSTAT module: the familiar (perhaps) CART program. This program has many excellent features for constructing and testing classification trees, using both CHAID and CART (or as SYSTAT now calls it, "C&RT"). Unfortunately, this sophistication in developing models apparently brings a limitation: the program only can make two-way splits in the tree diagram. (More formally, it can do only "bifurcation.") At the risk of disputing a point with Leland Wilkinson (the driving force behind SYSTAT, and doubtless one of the 50 smartest people in the Western hemisphere), building classification trees based only on two-way splits cannot be exactly equivalent to building trees in which many-way splits are possible. Perhaps most important, correct statistical testing for many-way splits must use different methods from the testing used for two-way splits. (Yes, I have a citation. If you care and want to know, please contact me.) The upshot of all this is that, in my experience, classification trees based solely on two-way splitting at times may obscure, or even miss, some useful patterns in the data. (Now that I've said this, you may fire at will.)

Please note, though, that the type of tree-building used in this module has become almost mandatory in certain types of medical research, where the goals are somewhat different from those related to marketing. Finally, classification tree analysis provides so many strong benefits, in both understanding and analysis of information, that anybody who works with data really needs to have some program that does this competently. For many, the SYSTAT module will more than meet all their needs.

Conjoint Analysis is perhaps not quite what you would expect, and certainly is different from the conjoint module in SPSS. This is actually a general-purpose modeling program that will fit additive models to data that you cannot measure with more specialized conjoint models. You can, for instance, fit trade-off models to data that does not come from experimental designs. This program can address the question of whether this type of model could fit, once you have data that was not collected with a standard conjoint procedure. As such, it could work as a useful supplement to the standard conjoint methods more familiar to some readers.

The various mapping procedures in Perceptual Mapping and Correspondence Analysis include a wide variety of procedures for representing and plotting data multidimensionally. If you already have the SPSS Categories module, you still should find some new approaches and features in SYSTAT. In addition, the discussions of mapping in the SYSTAT manual go into greater depth than those in the fairly slender SPSS Categories booklet.

Most of the other new procedures either seem highly similar to those in SPSS, or just seem to get fairly sporadic use in market research and allied fields. (I'll apologize in advance if I just insulted your personal pet procedure.) Some of these methods look like they could get more application. For instance, signal detection, used mainly in psychological experiments, might be a useful analytical tool where you have an overall rating, an actual response, and specific rating items. If any of you have explored this pos-

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sibility already, it might make an interesting article for this very column in another issue.

Now, we will move, at last, to the second question. Could you use SYSTAT as your only analytical program? Certainly, SYSTAT offers a wide enough range of features to cover many needs. In addition to the "new" features, SYSTAT has all of these analytical methods:

- Analysis of variance
- Linear regression
- Correlations, distances, and similarities
- Loglinear models
- Descriptive statistics
- Multidimensional scaling
- Design of experiments
- Nonlinear regression
- Discriminant analysis
- Nonparametric tests
- Factor analysis
- Path analysis (structural equation modeling)
- Frequencies and cross tabulation
- T-tests for means
- General linear models
- Time series

Note in particular that the SYSTAT path analysis (structural equation) module included in the program has plenty of features and power. It even has a name of its own: RAMONA. (RAMONA is another one of those long

acronyms, standing for "reticular action model or near approximation." Anyhow, it does structural equations. Now you know.) RAMONA does not have the graphical Windows-type interface, and consequent ease of generating output, that you will find in the SPSS add-on module, AMOS. (AMOS, another happy acronym, stands for analysis of moment structures). Analytically, though, you should find RAMONA thoroughly top-notch.

The differences between SYSTAT's RAMONA and SPSS' AMOS exemplify the differences between the two main programs. SYSTAT remains somewhat more command-oriented than SPSS, meaning you may type a little more, and probably look in the manual more if you are not familiar with parts of the program. SYSTAT's command language is logical, concise, and easy to use, but if you have not seen it yet, or have not used it for a while, you will need to take a few minutes to learn (or re-learn) its workings.

SYSTAT's analytical output is still text, not the nicer-looking "table objects" you get with most procedures in SPSS. This also means you cannot paste the output from SYSTAT directly into a spreadsheet program—where it neatly becomes cells you can manipulate or format—as you can with SPSS output. You usually also get somewhat more control over the contents of the output with SPSS, although most of the larger SYSTAT modules have gone well beyond the old days, when you could ask only for "short" or "long" (and sometimes "medium.") SYSTAT's charting and graphing capabilities have always been excel-

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lent, though, and remain so in this release. Now many charting features are available from handy menus and check-boxes, as well.

SYSTAT has one advantage over SPSS: price. Before we discuss this, you should recall that statistical analysis programs, selling as they do to a small, select audience (i.e., you), cost quite a bit more than programs like Excel and Word Pro. That said, you get everything in SYSTAT for just under \$1,000, which is quite a bit less than assembling the comparable modules in SPSS.

I have only one major request for SYSTAT. I wish the program would incorporate "progress meters" into its display screen, similar to those that appear in SPSS. These are little displays letting you know how far the program has gone in the analysis at hand. Especially if you are running computationally intensive procedures, like logistic regression, you want to know that the PC is busily working on the problem — and not frozen.

Overall, then, if you need the latest developments in Windows-related features, including output, displays, and menu-based controls, you still will want SPSS as your main statistical analysis program. If you use the program only occasionally, and want to get up to speed quickly, then SPSS again is the logical choice. If you are a more experienced user, and want the absolute maximum in analytical bang for the buck, then SYSTAT would be the better product for your needs. As suggested earlier, though, if you want a truly remarkable range of analytical tools, and your budget can tolerate it, go for both.

Scarcely go wrong

If any of these programs meets your analytical needs, you scarcely can go wrong by choosing it. As a reviewer of software, I can tell you that it is very gratifying to conclude a review in this way. Not too long ago, computer programs in general did far fewer things than you hoped they would, and many others that you wished they would not.

In summary, then: DBMS/COPY now has become about as speedy, comprehensive, and powerful a file-translation program as you can find. DeltaGraph provides tremendous charting and graphing capabilities, and remains my program of choice for times when programs like Excel or PowerPoint just don't have enough power to get the job done. SPSS Diamond offers unique data visualization and exploration capabilities. It needs some work to become more useful for presenting insights (as well as finding them), and I hope SPSS will continue developing this very promising program. SYSTAT provides a tremendous range and depth of analytical procedures, and remarkable charting and graphing abilities. Even users of SPSS will find many useful features in this program adding to those they now have. All of these programs could make highly useful additions to your analytical armamentarium. □

You can get more information on SPSS products at their Web site: www.spss.com. You will find more in-depth information on DBMS/COPY at www.conceptual.com. You can contact Steven Struhl (with questions or random compliments) at SMStruhl@aol.com, or in care of *Quirk's Marketing Research Review*.

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Product & Service Update

continued from p. 8

takes about three minutes to answer. Once completed, the patient drops the postcard into a mailbox and it is returned, postage paid, to HealthLink America.

Once the last survey is distributed, HealthLink allots two weeks for the surveys to be completed and mailed back. Data processing begins immediately with results being sent to the provider within 48 hours of data compilation. (Note: survey results can be sent to the network administrator, if requested.) The surveys may be used by practices/providers once a year, semi-annually, quarterly or monthly, whichever the provider prefers.

Costs of the Rx: VS4 survey range in price from \$229 to \$499, depending upon survey cycle, number of providers participating, and number of times per year the survey will be presented. All prices are all-inclusive, meaning that each provider package includes: individual provider profiles as well as comparative national norms, processing, postage and 200 questionnaires. Shipping charges are additional. For more information call Rebecca Booth at 317-573-2553 or rbooth@rumbadirect.com.

Mexican omnibus now available

Kormos, Harris & Associates, Inc., Toledo, Ohio, is conducting a quarterly research omnibus of Mexico in conjunction with Trendex Mexico, a Mexico City-based research firm. The Trendex Mexico Quarterly Omnibus is based on 3,906 personal interviews conducted quarterly with different samples of adult Mexicans (ages 14-65) in 10 cities. For more information call Randy Harris at 419-531-1366.

Firm measures technology market leadership

Cunningham Communication, Inc., a Palo Alto, Calif., public relations agency, has introduced Momentum

Management — a leadership positioning methodology that is based on a comprehensive market survey of how technology customers define and perceive market leadership.

Cunningham has surveyed over 2,000 buyers of technology products and services in the United States over the past year in building the Momentum Management methodology. As a result, Cunningham has created a statistical model for measuring market leadership that allows technology companies to assess their com-

petitive strengths and weaknesses.

Using the Momentum Management methodology, Cunningham has independently assessed the market positions of more than a dozen industry leaders, including Adobe, Apple, AT&T, Canon, Cisco, Hewlett-Packard, Intel, Intuit, Kodak, MCI, Microsoft, Oracle, Polaroid, Sprint and Xerox.

Based on its market research, Cunningham has learned that technology customers define leadership around 35 specific attributes that

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define a company's mass, speed and direction — the fundamental characteristics of momentum. The attributes that define leadership companies include: "has products and services essential to stay competitive"; "is in a category attractive to investors"; "attracts early adopters"; and "has technologies that are consistently revolutionary."

Cunningham established a partnership with San Francisco-based Socratic Technologies to perform fieldwork and validation on Momentum Management surveys. For more information call Sue Earabino at 617-374-4248.

Quantime updates Quancept

Quantime Corp., New York, has released an update of its telephone interviewing software, Quancept CATI 7e5. The new release includes: enhanced facilities for multilingual interviewing; improved support for

tracking studies, including different regions; options for creating different data formats, such as single and multi-coded ASCII files; a sampling algorithm which simplifies sample-based quotas by eliminating unnecessary dialing of the sample; additions to the scriptwriting language; refined project timings, accounting facilities and fixes to the automated testing feature; and more user-friendly interviewing and supervisory interfaces. For more information call 212-447-5300 or visit the company's Web site at <http://www.quantime.com>.

New Hispanic market study

Strategy Research Corp., Miami, is now offering its "1998 U.S. Hispanic Market Study," which provides 1998 population estimates, demography, language use, market characteristics, socioeconomic modeling, acculturation and cultural components, media habits, shopping habits, sports mar-

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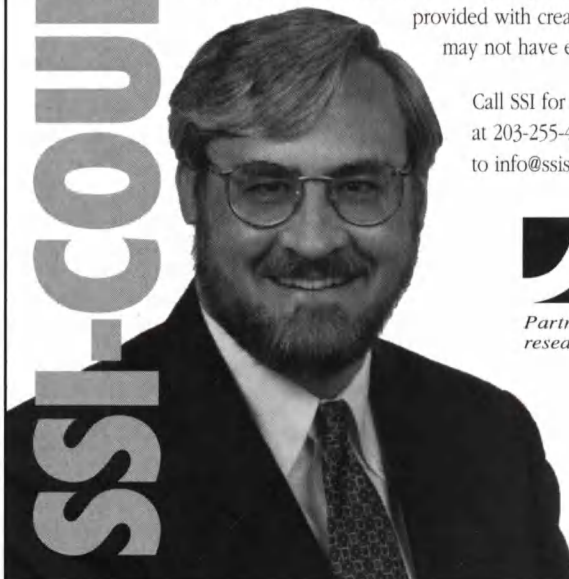
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VIS offers audience response system

Vistacom Information Services, a new professional services firm in Plymouth Meeting, Pa., is now offering information gathering systems, including audience response technology. The company's Stadia system includes audience keypads, a laptop computer, and a video projection system. Its wireless, digital keypads use radio frequency technology and its software runs in a Windows environment. Companies have the option to rent, lease or purchase the Stadia system. For lease or rental contracts, Vistacom engineers will be on hand to operate the system. Training is offered with all purchases. For more information call Scott Casey at 610-940-1744.

Web bureau for Bellview WEB users

Pulse Train Technology has set up a Web bureau to provide a way for research companies to conduct sur-

veys over the Internet. The bureau will put up surveys for interviewing to be carried out using Pulse Train's new Web data collection software, Bellview WEB. Respondents can then log into Pulse Train's Web server using any compatible browser, such as Internet Explorer or Netscape Navigator, and carry out the Interview over the Internet. Surveys are set up for Bellview WEB using Pulse Train's QSL scripting language (or using Visual QSL, the company's Windows survey design package) so that the new software is compatible with other data collection products in the Bellview range. This also means that options such as full logic and data checking, rotation and randomization and substitution of text during an interview are all supported. Images can also be included to aid response and make the interview a more enjoyable experience. For more information call Hank Copeland at 561-842-4000 or visit the company's Web site at <http://www.ws.pipex.com/ptt>.

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Research Industry News

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based in Atlanta. A strategic partnership between the three companies has been in effect for several years, but plans to consolidate PVR and TRS into the core business were only recently completed. Terms of the agreement were not disclosed.

Polaris Marketing Research, Atlanta, has moved to new facilities to accommodate added personnel and a larger telephone interviewing center. The new address is 359 East Paces Ferry Rd. N.E., Ste. 250, Atlanta, Ga., 30305. The phone numbers remain 404-816-0353, 888-816-8700, and fax 404-816-0352.

Migliara/Kaplan Associates, an Owings Mills, Md., research firm, has reorganized into a newly-formed multi-divisional structure whose corporate goal is to match areas of specialization with key target audiences. The new structure has three divisions: the Core business, International, and Consumer Healthcare. To effect the change, Jeffrey Whittle assumes the title of chief operating officer of the Core business; Harris Kaplan, executive vice president, will head the International Division, and Sheryl Olitzky, senior vice president, will direct Consumer Healthcare in addition to her responsibilities in the Core business.

The Marketing Research Association has moved to 1344 Silas Deane Highway, Ste. 306, P.O. Box 230, Rocky Hill, Conn., 06067-0230.

John W. Turner and Pat M. Snyder have opened **What They Think, Inc.**, a full-service research and consulting firm. The company will have two offices: 4060 Peachtree Rd., Ste. D430, Atlanta, Ga., 30319, phone 770-604-9123, fax 770-352-9219; and 5039 Hillsboro Pike, 166 Jefferson Sq., Nashville, Tenn., 37215, phone 615-383-4446, fax 615-463-0602. E-mail:

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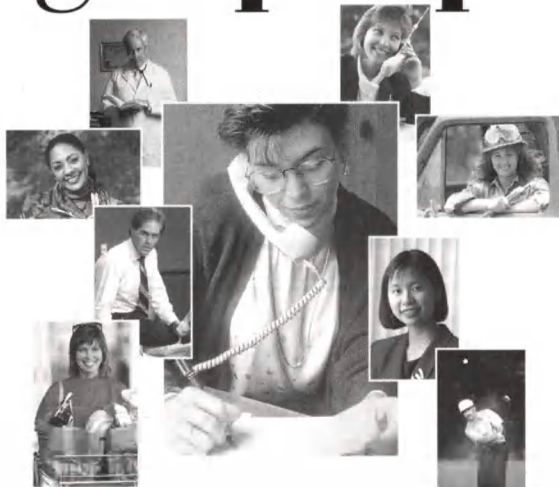
Marketing Evaluations has opened its own Web site at <http://www.qscores.com>. Information and samples of the company's Q Score services, such as TVQ, Performer Q and Kids Q, are shown in detail.

Atlanta-based **Equifax** has signed a letter of intent to acquire **Goldleaf Technologies, Inc.**, of Hahira, Ga., a

provider of electronic banking software to independent financial institutions.

Audits & Surveys Worldwide, New York, and London-based Kantar Media Research are forming ASW-Simmons Magazine Metrics, a joint venture partnership to expand the Primary and Total Audience Surveys, a recently released magazine research service developed by ASW.

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Names of Note

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vice president education; **Jerry Lopes**, vice president research; **Robert Norris**, vice president membership; **Edward Seipp**, treasurer; **Michael Gantt**, secretary.

Digital Marketing Services, Inc., Dallas, has appointed **George Harmon** senior vice president, research services and **Shelly Bracken** senior director, business development. Previously Harmon was with Dairy Management, Inc. Bracken was manager of integrated marketing information for J.C. Penney Company's consumer research department.

Robert Edquist has joined *C.J. Olson Market Research, Inc.*, Minneapolis, as data collection manager. Previously he was with Nordhaus Research, Inc.

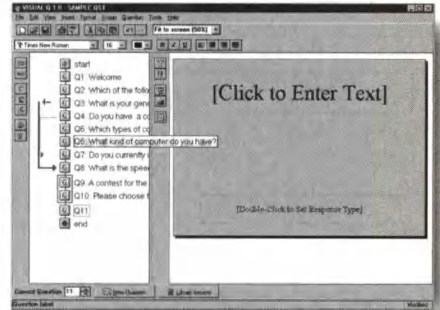
Emily Mulvihill has been named project manager at *Aragon Consulting Group*, St. Louis. In addition, the firm has awarded internships to Jennifer Vonderheid and Alan Caldwell.

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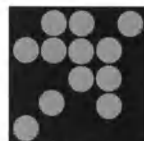
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Trade Talk

continued from p. 82

at least one PC, while 22 percent will own two or more computers.

- The PC buying binge will last until 2001. By then, bit-crunching devices — from DVD players to HDTV sets to home digital camera darkrooms — will vie for the 21st-century digital dollar.

In the past, frugal consumers could find products at this price point, but those systems were a generation behind and could barely run contemporary software. Today, Compaq, Packard Bell, Hewlett-Packard, and Acer hawk fully functional desktops that easily run Windows 95 and popular consumer applications like games and financial software. Only a few vendors abstain from this market: 1) financially troubled Apple; 2) corporate-focused Dell; 3) convergence-minded Sony; and 4) tentative Toshiba, which can't decide whether or not to abandon the home-PC arena. For companies in the low-cost market, business thrives.

Forty percent of retail PCs sell for under \$1,000. Manufacturers and retailers report that these devices account for anywhere from 30 percent to 65 percent of consumer purchases. The ASP for all home computers now runs around \$1,200, and the industry expects it will continue to nose-dive.

First-time buyers lead the charge. The industry claims that 30 percent to 60 percent of cheap PCs go into households that do not already own a computer. Remaining units

are bought as either replacements or supplements for households that currently have a system.

Retailers make money — but not on PCs. Low-cost systems create foot traffic but very little profit for merchants. Successful players may only make \$20 on a cheap PC, but they can generate substantial profits from selling warranties, software, printers, and color inkjet cartridges.

Why is the sub-\$1,000 PC thriving now? Three stars have aligned to create a fertile marketing environment for this new segment.

- Vendor infighting. Making money in this market becomes possible only with incredibly efficient operations and high volumes. Market leaders like Compaq, Packard Bell, and Hewlett-Packard willingly sacrifice margins for market share.

- Credible alternative microprocessors. Compaq and IBM use chips from AMD and Cyrix in their PCs because the clones offer Pentium performance for less than three-quarters of the cost. Microsoft supports Intel-compatible CPUs by promising to tweak Windows to take advantage of new features in next-generation clone chips.

- Stable applications. Today's software rarely runs out of processing room. Windows 95 performs perfectly well on cheap PCs, and early tests show that its successor, Windows 98, will run even better on the same hardware. Cheap PCs offer plenty of horsepower for popular consumer software like Collier's Encyclopedia or Intuit's Quicken. □

Next month: Prices will keep falling.

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Trade Talk

By Joseph Rydholm/QMRR editor

Cheap PCs: Is the revolution finally here?

For years, computer industry observers have preached the gospel that home computers, once they reached mass acceptance, would enrich our lives in myriad ways, bringing us unlimited educational and communication opportunities. In the beginning, that promise seemed to apply only to those who could afford to spend thousands of dollars on a PC. But now, with prices of well-equipped computers dropping below \$1,000, will the pundits' dreams become reality?

Computers may never reach the penetration levels of television (then again, who knows?) but even if they get close, the implications and opportunities for marketers are staggering. With an ever-expanding audience, the Internet (and the other, as-yet-unknown vehicles for computer-based commerce and communication that are sure to follow) may finally

fulfill the potential that has so far eluded many companies that have dabbled in cybermarketing.

To provide some perspective on the advent of the sub-\$1,000 PC, we offer a two-part article which was compiled from several reports provided by Forrester Research, a Cambridge, Mass., firm specializing in the computer and high-tech industry.

Forrester defines cheap PCs as home computers that cost \$999 or less and include a Pentium-class processor, CD-ROM drive, sound card, and a minimum 16MB of memory, 1GB hard drive, and 33.6Kbps modem. A monitor is not included.

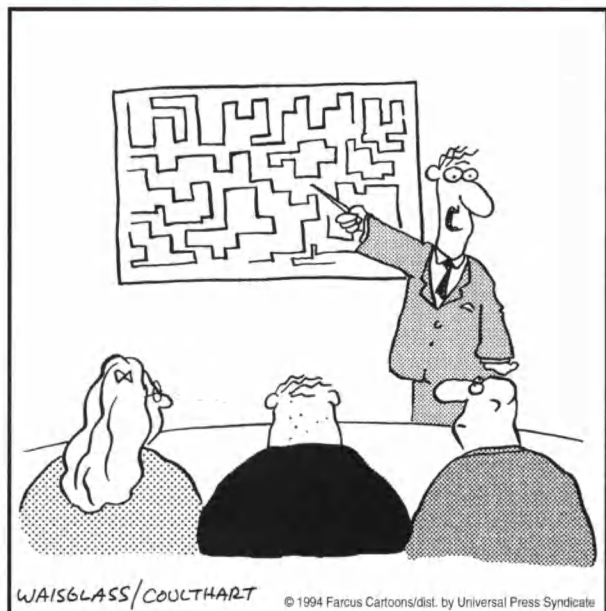
To research this topic, Forrester spoke with executives from Acer America, AMD, America Online, Apple Computer, Avalon Software, Berkeley Systems, Compaq, CompUSA, Cyberian Outpost, CyberMedia, Dell Computer, Egghead Computer, *Family PC* magazine, Geoworks, Hewlett-Packard, *HomePC* magazine, IBM, Ingram Micro, Intel, Internet Shopping Network, Intuit, Iomega, Juno, LSI Logic, LucasArts, Lycos, Micrografx, Micron, Microsoft, Monorail, National Semiconductor, Netscape, ONSALE, Packard Bell NEC, RCA/Thomson, Sony, Staples, and Teac.

Part I below explains how the sub-\$1,000 price point came about and who's buying all those inexpensive PCs. Next month, part II will cover the implications for the computer industry and Internet marketing.

—Joseph Rydholm/QMRR editor

Farcus

by David Waisglass
Gordon Coulthart



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1997 was the year of cheap PCs. Vendors and retailers assert that 30 percent to 40 percent of consumer PCs sold in the United States during the last four months were priced below \$999. But will this party last? Forrester Research predicts that:

- Cheap PCs will capture 55 percent of the U.S. consumer market by year-end 1999. The average selling price (ASP) of consumer PCs will drop below \$599.
- Lower price points will increase U.S. household penetration as well as expand the number of homes with multiple PCs. By 2002, 60 percent of U.S. households will have

continued on p. 81

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103. Marketing Research for Decision Makers New York Jan. 15-16 Cincinnati May 4-5	501. Applications of Marketing Research New York Jan. 8-9 Cincinnati Feb. 19-20 San Francisco Apr. 30-May 1 Atlanta June 18-19 Cincinnati Aug. 13-14
104. Questionnaire Construction Workshop San Diego Jan. 12-14 Cincinnati Feb. 23-25 New York Mar. 30-Apr. 1 Boston May 4-6 Cincinnati June 8-10 Chicago July 13-15 Cincinnati Aug. 17-19 Atlanta Sept. 28-30	502. Product Research New York Jan. 13-14 Cincinnati Apr. 1-2 Chicago July 14-15
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202. Focus Group Moderator Training Cincinnati Feb. 3-6 Cincinnati Mar. 3-6 Cincinnati Apr. 14-17 Cincinnati May 12-15 Cincinnati June 23-26 Cincinnati Aug 4-7 Cincinnati Sept. 15-18	506. Customer Satisfaction Research Boston Jan. 29-30 Cincinnati Apr. 9-10 New Orleans July 23-24 Chicago Sept. 24-25
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301. Communicating Marketing Research New York Jan. 19-21 Cincinnati Mar. 9-11 Chicago Apr. 13-15 Boston May 18-20 Cincinnati July 6-8 Cincinnati Aug. 31-Sept. 2	603. Practical Multivariate Analysis New York Feb. 3-6 Cincinnati Mar. 17-20 Chicago Apr. 21-24 Cincinnati June 2-5 Boston July 7-10 New York Aug. 4-7 Cincinnati Sept. 15-18
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