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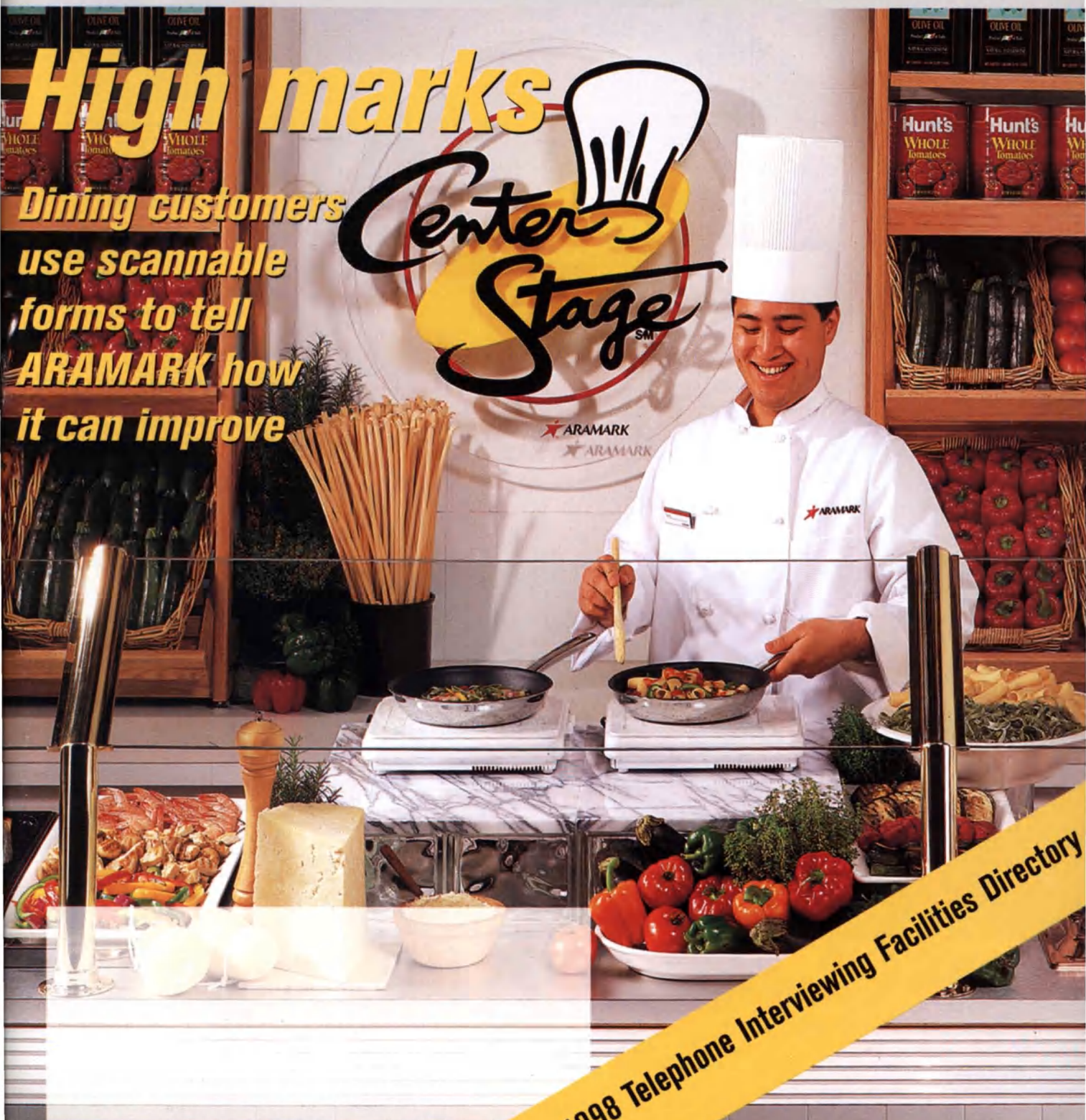
Review

High marks

Dining customers use scannable forms to tell ARAMARK how it can improve



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1998 Telephone Interviewing Facilities Directory

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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
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Nov. 9 - 11, 1998 Cincinnati

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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
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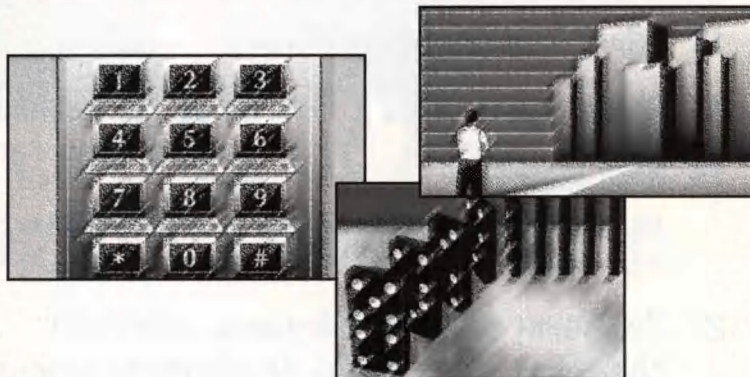
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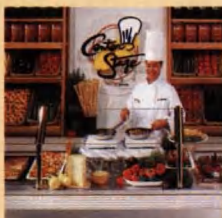
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C O N T E N T S



Volume XII, Number 5

May 1998

An annual survey of dining patrons keeps ARAMARK in touch with customer opinions and preferences. Photo courtesy of ARAMARK.

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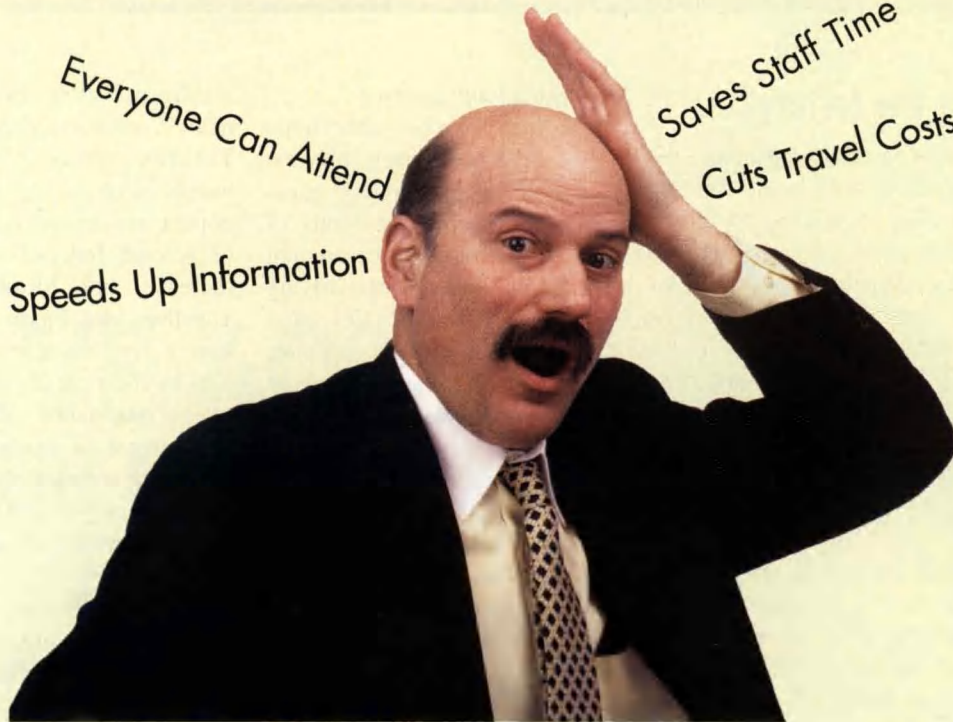
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Who plays the lottery?

When it comes to taking chances, men aren't afraid to try their luck — in the lottery, at least. According to a recent Maritz AmeriPoll conducted by St. Louis-based Maritz Marketing Research, 42 percent of American men play the lottery at least once a month, and one-fourth of them play weekly. By contrast, nearly half of women say they never play the lottery, with just one-third playing at least monthly, and 15 percent playing weekly.

When men take chances in the lottery, they go all the way. Of those who say they played the lottery daily, 93 percent of men played seven days a week, versus two-thirds of women who play daily. Though many respondents say they never play the lottery (43 percent), those who do most commonly play once or twice a week (20 percent), or once or twice a month (16 percent). And since men play most often, they tend to spend more money on lottery tickets in a typical month: 54 percent of men spend \$5 to \$50 per month, while 51 percent of women spend less than \$5 per month. Men are twice as likely to spend more than \$50 each month on lottery tickets.

Gas stations and convenience stores are the most popular places to buy lottery tickets, favored by 64 percent, followed by grocery stores (22 percent), liquor stores (8 percent), and drug stores (3 percent). Seventy percent of men buy their tickets at gas stations and convenience stores, while women and the elderly are more likely than men to try their luck at grocery or drug stores.

The Wednesday and Saturday games are most popular among lottery players, preferred by 54 percent. Instant scratch-offs were next with 32 percent, followed by weekly games (28 percent), and daily games (8 percent). The thrill of instant gratification provided by scratch-off tickets was significantly more popular among the young crowd, chosen by 57 percent of

18-24-year-old lottery players.

Finally, there's proof that hope springs eternal among lottery players: 74 percent claim that lottery game odds do not influence the kinds of tickets they buy. Instead, the amount of the jackpot seems to be the driving force behind lottery ticket sales, cited by 57 percent as an influence to play, followed by hearing or reading about other winners (9 percent), in-store signs and advertisements (8 percent), and television ads (5 percent). Still, nearly one-third say they play the lottery no matter what the stakes. For more information call 800-446-1690 or visit the Maritz AmeriPoll Web site at <http://www.maritz.com/apoll>.

Middle East population to rise rapidly

Nearly every Middle Eastern country will see a rapid rise in the number of its inhabitants over the next 15 years, says a new study by market

intelligence group Euromonitor in its new "Consumer Middle East 1998." The first edition of this statistical handbook on the region shows that the population of Saudi Arabia will rise by 61 percent, Iran will see a 41 percent increase and Jordan 57 percent. Together, Iran, Egypt and Turkey will have a population of around 255 million by the year 2010. Even now, the rate of population growth is at least 2.5 percent in every country. As a result, the average age in the Middle East is very young: about four out of every 10 people are under the age of 15.

The two main reasons for the population explosion are the dramatic drop in infant mortality resulting from better living standards and health services, and the region-wide preference for large families. In some countries, women typically give birth to as many as seven or eight children. Saudi Arabia has the highest birth rate, with

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Point of sale promotions ineffective

In the struggle to gain attention at the point of sale, consumer product marketers are spending an increasing amount of money on a variety of sales promotions. A survey conducted by CDB Research & Consulting Inc., New York, indicates that these sales promotions are often ineffective.

The study reveals that only 25 percent of consumers shopping in supermarkets notice point of sale promotions on product packaging. Of those who do, only two out of five will go on to purchase the product offering the promotion. "American companies have been slow to recognize the importance of conducting pre- and post-promotion research," says Larry Chiagouris, managing director, CDB Research & Consulting Inc. "Knowing what attracts consumers' attention can save dollars invested in programs that often fail to produce results."



According to the survey, point of sale promotions are most effective when geared towards the young, single, and less affluent shopper. "We've studied consumer response to a wide variety of marketing techniques," says Chiagouris. "Point of sale promotions in supermarkets appeal to the most price-conscious elements of the shopping public." For more information call 212-367-6858.



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New survey design software from NCS

Minneapolis-based National Computer Systems has introduced SurveyTracker Plus, a software package that integrates the entire survey process from concept to analysis. Users can create custom survey designs, print their documents, enter survey data automatically using an OCR scanner and prepare a variety of reports. The software has checklists for tracking details, plans and schedules to help eliminate missed steps and errors. It also monitors budgets and actual costs, calculating totals, deviations and costs per respondent. For more information call 800-447-3269 or visit the company's Web page at <http://www.ncs.com>.

New application for MapInfo

Spatial Insights, Vienna, Va., is now offering a Data Indexing application for its MapInfo mapping program. The application was developed in response to client-driven mapping projects that required the evaluation of multiple demographic variables to identify and rank target markets in support of site selection demographic profiling studies. It combines multi-variate spatial data and provides for a two-tiered weighting and ranking of variables according to user-defined parameters. The Data Indexing application can evaluate up to 30 variables at a time and runs directly within MapInfo Professional. For more information call 703-827-7031 or visit the company's Web site at <http://www.spatialinsights.com>.

Conduct full-profile conjoint on the Web

Q.P.R. America, Carlsbad, Calif., is offering MarketMaker, a Windows-based and Internet-enabled full-pro-

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RESEARCH WORKSHOPS: The Society of Insurance Research will conduct a series of workshops covering primary market research, competitive intelligence and product development on June 1, 2, and 3, respectively, at the Hyatt Regency Hotel in Atlanta. The primary market research workshop will focus on the research process, research design, data analysis and interpretation, and case study analysis. The competitive intelligence workshop will focus on the value of competitive intelligence, defining actionable competitive intelligence, state-of-the-art competitive intelligence in action, and use of commercial databases. The product development workshop will address the five-step development process (ideation, validation, design, implementation, evaluation). The series is open to both members and non-members of SIR. For more information call 770-426-9270.

ANNUAL MRA CONFERENCE: The Marketing Research Association will hold its 40th annual conference in Chicago from June 3-5 at the Chicago Marriott Downtown. The theme is "The Winds of Change - Connections and Recollection." The conference is designed to provide attendees with industry information and education in research methods and skills that will enable them to build a competitive advantage in a dynamic marketplace. For more information call 860-257-4008.

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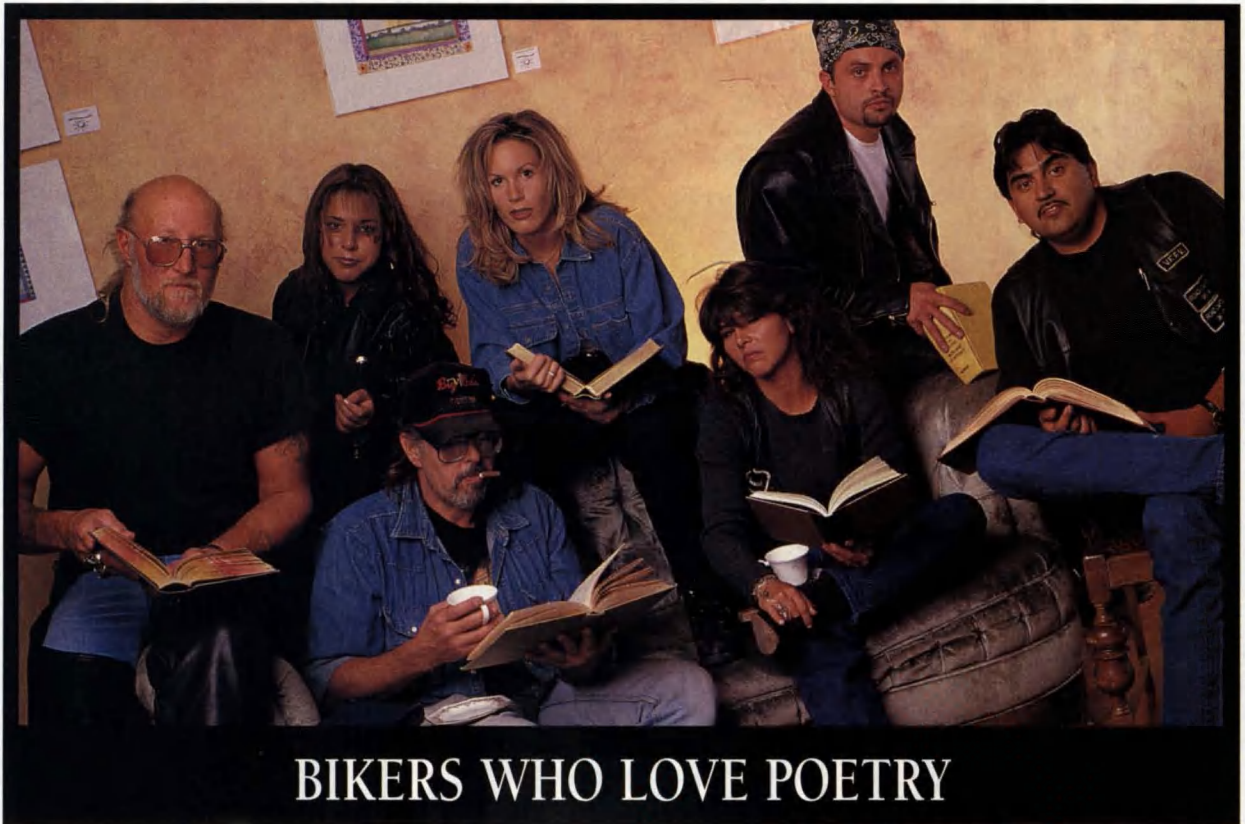
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Names of Note

Armour Swift-Eckrich, Inc., a Downers Grove, Ill., division of ConAgra, has named **Dennis O'Neill** director of marketing research. He replaces **Wally Heintzen**, who retired in March after 11 years as director of the department.

SOFRES Intersearch, a Horsham, Pa.-based research firm, has named **E. Layton Dorey** vice president and managing director of automotive research. He and his staff will be based on Detroit.

Tish Pasqual has joined the Minneapolis office of *Total Research Corp.* as associate research director.

Barbara Jacobsen has been appointed director of marketing services North America for *Swissair*, Melville, N.Y. Her responsibilities include research and planning.

Andrew Grebe has joined *TeleSession Corp.*, New York, as director of operations.

C.J. Olson Market Research, Inc., Minneapolis, has named **Jolie Kennedy** marketing research assistant. The firm has also named **Neil**

Palosaari data processing manager.

Kathy Day has been promoted to vice president at the Arlington Heights, Ill., office of *Market Facts, Inc.*



Day Adler

Jeffrey Adler has been named president and managing member of *Centrac DC*, a Rockville, Md.-based research firm. Previously he was vice president of *Woelfel Research, Inc.*

Mark DeTorre has joined *tk associates*, a Minneapolis research firm, as executive vice president and partner.

David M. Thompson has joined *Marketing Leverage, Inc.*, a Glastonbury, Conn., research firm, as senior consultant. Previously he was director of marketing research for CIGNA Individual Insurance in Bloomfield, Conn.

Research Resources, Minneapolis, has promoted **LeeAnn Williams** to AR manager, handling the field logistics for its newly acquired Chicago office, *Analytic Resources*. *Research Resources* has also named **Kimberly Olsen**, **Hajer Ameur** and **Heather Cronin** project directors and **Sharon Osborn-Bale** senior project director.

Melissa Thrower has been promoted to director of data processing at *CB&A Market Research*, Winston-Salem, N.C.

Robert V. Miller has been named president and CEO of *Cooper Research, Inc.*, Cincinnati, replacing **Sanford L. Cooper**, the company's founder and former president.



Miller Maresca

John Maresca has joined *Directions in Research*, San Diego, as project director. Previously he was a senior research associate for *The Washington Post*.

Roper Starch Worldwide, a New York research firm, has named **Michael L. Silverman** account director.

Richard Von has joined the business development department of *Intelligent Marketing Systems*, Minneapolis, as manager of account management. In addition, **Steve Nelson** has been named senior business analyst within the company's business intelligence department.

Decision Analyst, Inc., Arlington, Texas, has appointed **Sue Chan** director of its *Econometrics Consulting Group*.

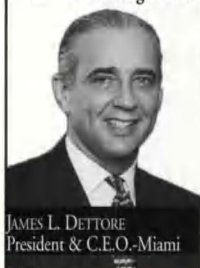
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Global market research firms **ACNielsen**, **Research International**, and **GfK** have signed on with Stamford, Conn.-based **FocusVision Worldwide** to offer videoconferenced focus groups from FocusVision-equipped studio locations in Europe and Asia.

Nine teams of researchers won the **Advertising Research Foundation's** (ARF) 1998 David Ogilvy Research Awards for outstanding research programs that impacted successful advertising. The team from Campbell Soup Company, Camden, N.J., led by Michael Schwartz, market research U.S. Group Director, its advertising agency BBDO/NY and IPSOS-ASI Market Research, Stamford, Conn., won the David Ogilvy Research Trophy for their research for Campbell's Swanson Broth "How Much" campaign.

Runners-up receiving Gold Medallions were two Kraft Foods, Glenview, Ill., research teams. The first, led by Sue Lynch, category information manager at Kraft for Miracle Whip "What's For Lunch/Don't Skip the Zip." Ad agency: J. Walter Thompson Chicago and Lorán Marketing Group, Chicago. The sec-

ond, Kraft Brand Salad Dressing's "Everyday's Got a Taste for Kraft" campaign led by Raj Rajaratnam, director of marketing information. Ad agency: Leo Burnett and Murtaugh Match, Madison, Wis., market research.

Silver Medallions went to:

- Unilever HPC, Helene Curtis Business Unit, Chicago, for "Degree/Competitive Research" campaign; DDB Needham, Chicago, and Ameritest, Chicago.

- Star Enterprises of Norcross, Ga., for "Texaco Gasoline/1997" campaign; Bates SW, and National Decision Systems, Vienna, Va.

- Anderson Consulting, Chicago, for Image Advertising; Young & Rubicam NY, and OmniTech Consulting Group, Chicago, Goldfarb Corporation, London, and Frank Small Associates, East Sydney, Australia.

- Ultrafem, N.Y., for Instead "Women Have Changed" campaign; Bozell, NY and KRC Research & Consulting, N.Y.

Bronze Medallions went to:

- Campbell Soup Company of Camden, N.J. for Pepperidge Farm Milano Cookies "Suspicious" campaign; Saatchi & Saatchi, NY and ASI Market Research, Stamford, Conn.

- Bell Atlantic, Arlington, Va., for Bell Atlantic Caller ID; Saatchi & Saatchi, and Gallup & Robinson, Pennington, N.J., Mapes and Ross Communications Research, Princeton, N.J.

- Schering-Plough Health Care Products, Liberty Corner, N.J., for DynaStep "BioMechanics" campaign; ad agency Messner Vetere Berger McNamee Schmetterer, N.Y.

The David Ogilvy Awards were created in 1994 to acknowledge the vital role played by market research in the development of successful advertising campaigns. Entries for these awards take the form of case histories that describe research conducted by advertisers, agencies, research companies, media or a combined team. The awards are sponsored by the ARF in cooperation with the Association of National Advertisers and the American Association of Advertising Agencies.

Market Facts, Inc., Arlington Heights, Ill., has acquired **Tandem Research Associates, Inc.**, with offices in Mahwah, N.J., and Suffern, N.Y. Tandem will operate as an autonomous subsidiary of Market Facts under the direction of its current management team led by co-founders Daniel Fish and Donald Rupnow.

MRCPhone has moved to a new call center facility. MRCPhone has 50 CATI stations supported by a Novell 4.11 network and the Meridian T-1 telephone communications system. For more information call 702-734-7511.

Focus on Boston has opened a suburban focus group research center in Braintree, Mass., 10 miles south of Boston next to the Sheraton Tara Hotel and adjacent to the South Shore Mall. The facility features two suites, viewing, conference and lounge areas. For more information call 617-946-0755.

Khalifa Al Mukheini has opened **SIMPA Market Research &**

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Menlo Park, Calif.-based **CustomerSat.com**, a provider of customer satisfaction measurement services using the Internet, and San Francisco-based **Flycast Communications Corp.**, a provider of Web advertising management services, have formed a partnership to enable the 350+ member sites of the Flycast Open Network to measure the satisfaction and determine the demographic profiles of their Web site visitors in real time. In other news, CustomerSat.com conducted customer satisfaction and loyalty research for Aurum Software, Clarify Inc., Onyx Software Corp., and The Vantive Corp.

Siemens Medical Systems, Inc. has retained **Gordon Bailey & Associates, Inc.**, Atlanta, to develop a customer

profiling, brand positioning and communications program for its line of medical instrumentation devices.

Market Segment Research & Consulting, Miami, has been selected by Frito-Lay as a Minority/Women Supplier of the Year for the marketing department. Frito-Lay cited the firm for its contribution to helping Frito-Lay achieve its 1997 corporate objectives.

NFO Worldwide, Inc., Greenwich, Conn., has acquired Ross-Cooper-Lund, a Teaneck, N.J., research firm, and MarketMind Technologies, a Melbourne, Australia firm which developed the MarketMind continuous information tracking system. In separate transactions, NFO acquired substantially all the net assets of each company for the combined consideration of \$16.6 million. In other news, NFO announced it has concluded a private placement of \$40 million in fixed rate Senior Notes and entered into a \$75 million revolving credit agreement with four major U.S. banks. Also, NFO has signed a definitive Agreement of Offer to Purchase Toronto-based CF

Group, Inc., a research organization which operates three divisions within Canada - Canadian Facts, Applied Research Consultants, and Burke International Research. Annual revenues are approximately \$31 million (CAN).

Intelligent Marketing Systems, Inc. (IQ), Minneapolis, will provide market research services to Seren Innovations, a subsidiary of Northern States Power Co. In addition, IQ will provide tracking and database management to Ciprico, Inc.

Tim Huberty has founded **Huberty Marketing Research** at 1924 Jefferson, St. Paul, Minn., 55105. Phone 612-698-8776. Fax 612-698-1011. E-mail thuberty@uswest.net.

Decision Insight, a Kansas City, Mo., research firm, recently celebrated its 15th year in business.

Jim Steber has opened **Communications for Research, Inc.**, a data collection and consulting firm, at 61 East Highway 8, P.O. Box BF, continued on p. 127

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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.

Mark Michelson of Michelson & Associates, whose company conducts mystery shops, tells about one holiday season when the company had a shopper whose husband was a part-time Santa. He accompanied her on a shop to a retail establishment and was still in uniform. His beard and belly were real. As part of the shopping assignment the shopper was supposed to present an objection to the sales clerk. The objection the couple provided was that he didn't have room to park his sleigh!

Michelson indicates that his firm subsequently reshopped the store, with a more likely objection.

Market research companies are well aware of receiving calls from consumers to sign up for focus group work. Word gets around that they pay \$50 for two hours of "just sitting there giving your opinion." Jewel Alderton of Facts Consolidated tells about some of the calls that her firm received inquiring about this type of "work."

One Southern California man called the firm's Los Angeles office, and after someone took down his demographic information he stated, "I want to do one in New York, and I assume you'll pay the airfare."

Another man, after being asked his age, said, "I'm an actor. I'll be any age you want me to be."

Still another man called and said a

friend told him he could make \$25 an hour for tasting things and giving his opinion. After providing his classification information he wanted to know when he could start, saying, "This is full-time work, right?"

Alderton also tells about a telephone survey her company was conducting about shopping habits, where the quota for respondents over the age of 55 had already been filled. So at this point in the study the screener read, "We're conducting a short survey about shopping habits and would like to include your opinions. Are you the male/female head of the household and between the ages of 18 and 54?"

The female on the other end of the phone replied, "No, I am 81 years old, but I would like to do your survey."

The interviewer tried to explain about quota sampling, but the woman insisted on being interviewed. Finally, the interviewer referred the matter to the supervisor. When the supervisor got on the line, the consumer asked for all pertinent information about Facts Consolidated and informed the supervisor that their practices were discriminatory. She further informed the supervisor that she would take the necessary steps to report Facts Consolidated to the AARP and the President's Council on Aging.

So far, no one has been arrested, and the President's Council on Aging has not been heard from.

Sometimes researchers get no respect. In the middle of a focus group that Gary Rudman of Teenage Research Unlimited was once moderating, one of the hostesses came in the room and grabbed a bag of plain M&M's from a cabinet, left and closed

the door. Ten minutes later she returned to grab a bag of peanut M&M's.

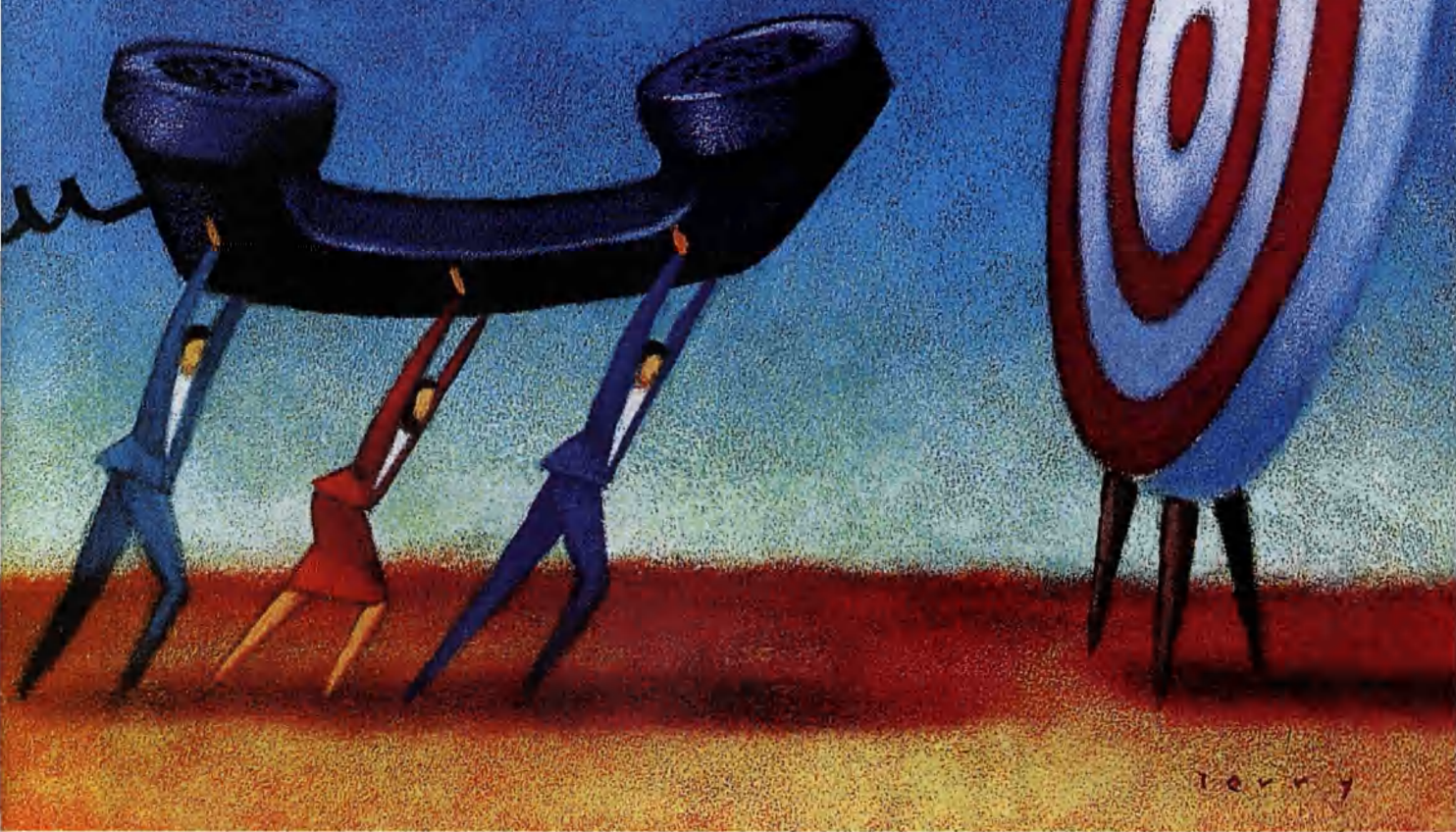
After the session ended, Rudman explained to the hostess that it was unacceptable for her to interrupt focus groups in this way. The hostess stood her ground and told him, "One of my other clients in another back room really wanted M&M's!"

Ted Dunn, technical consulting director at the Advertising Research Foundation, tells about a packaging study he was involved with years ago, where the results were presented to the top management of a pasta manufacturer. The owner of the company was from "the old world," and he was impressed with how the new packaging performed better in the research than the current packaging, although it was obvious he didn't quite understand all the technical details underlying the research, such as sampling.

The owner halted the meeting, and right then got on the phone to speak with the person at his company responsible for manufacturing the packaging. When that person offered his opinion about the quality of the current packaging, the owner informed him, "Listen, I got 185 people here who think the new one is better."

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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Why

I love

predictive

dialers

By Joe Rafael

Editor's note: Joe Rafael is chairman of Opinion Access Corp., Long Island City, N.Y. He can be reached at 718-729-2622 or at jrafael@opinionaccess.com.

Most market researchers who have anything to do with telephone interviewing have heard of predictive dialers. Most are not sure exactly what they do. Some love them. Some hate them. Some think they are great. Some think they are terrible. Everyone thinks they are expensive. And, of course, every telephone call center that has them proudly mentions

them in their advertising.

During the past 15 years, in various ways, predictive dialers have been part of my working life. Beginning in 1982, I lead a programming team that designed a market research CATI system. In 1986, based on client requests, we built an interface between our CATI system and predictive dialers.

Our marketing strategy was to be a turnkey vendor, which meant that we provided not only the CATI software but also the computer, the terminals, the cabling, training and other services needed to get the calling center up and running. In keeping with this strategy,

we became resellers for three predictive dialer companies and when one of our CATI clients decided to add predictive dialers, they purchased them from us. During the years, we sold over 2,000 predictive dialer stations.

Last year, we sold the CATI software division of our company. Today, we operate a market research telephone call center in Long Island City, N.Y. Yes, we are a CATI center. Yes, we are a predictive dialer center. Yes, we love them. Yes, we think they are great. And yes, of course we proudly

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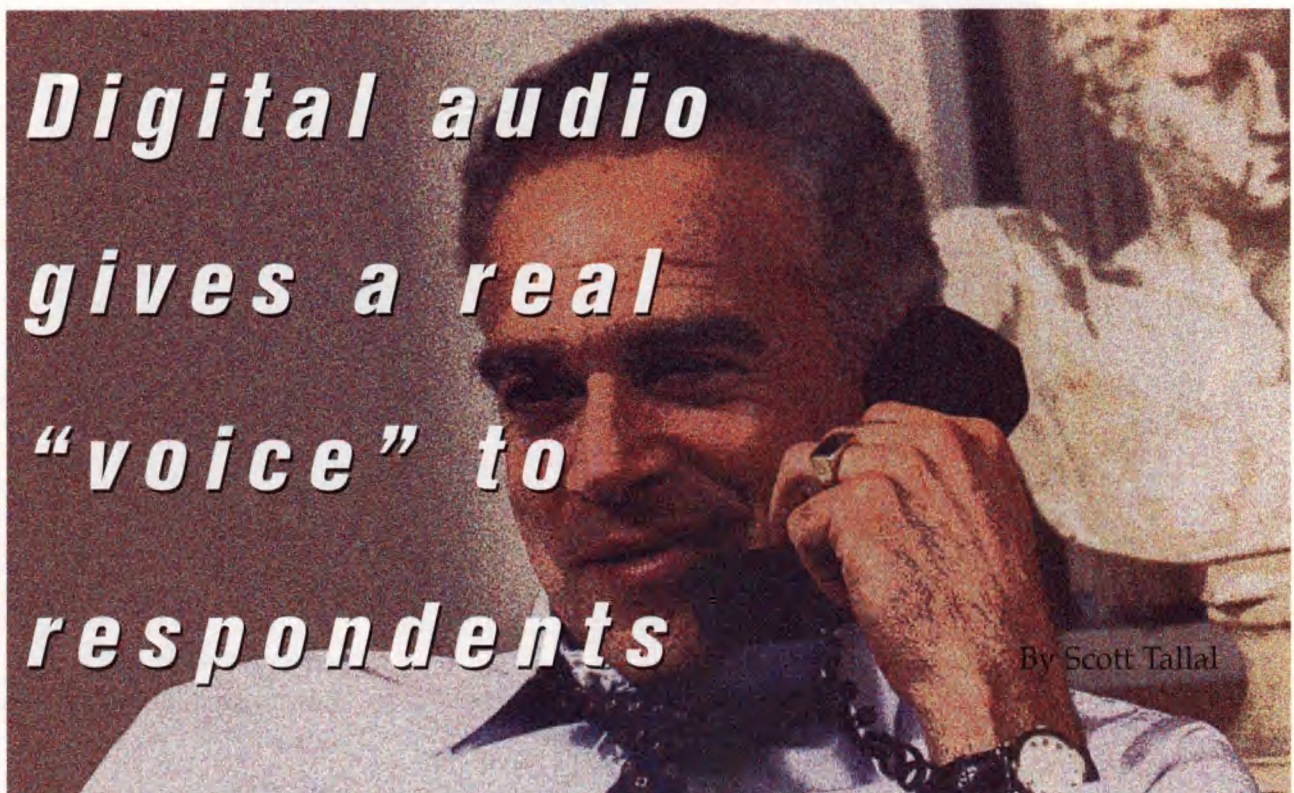
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Editor's note: Scott Tallal is president of Advanced Research Services, Dallas, Texas. He can be reached at 214-692-1114.

If you're looking for an unbiased, dispassionate analysis of the relative merits of adding digital audio to telephone surveys, this article isn't going to be it. Voice-capture has had a profound impact on almost every aspect of our research operation, changing everything from the way we write questionnaires and conduct interviews to the way we analyze and present the results.

What was once conceived as an optional add-on to our existing service is now a standard part of almost every telephone project we do. Even if we were never to share these audio recordings with our clients, we would still want to have voice-capture available for our own use. From an analyst's perspective, it represents a quantum leap in the ability to understand what drives respondent behavior. More important, our experience with voice-capture has revealed that traditional verbatim transcription of open-end responses from a telephone survey can lead to erroneous interpretation.

Whether interviewers use paper-and-pencil questionnaires or computer-assisted surveys, they are simply incapable of taking down a respondent's every word. Since very few people can write or type as fast as a respondent can talk (upwards of 150 words per minute), interviewers have to mentally edit these comments during the process of

transcription. At the same time, the transcription process itself interferes with the interviewers' ability to listen closely to what the respondents have to say. As a result, the quality of probing really begins to suffer, and most interviewers fall back on generic follow-ups (i.e., "What else?" "Anything else?"). With voice-capture, interviewers are free to focus their attention on respondent comments and follow-up probes.

Despite the apparent advantages of voice-capture, there are a number of logistical and operational considerations. The sheer volume of digitized data dramatically increases the demand on storage systems, beginning with data collection and continuing through every phase of analysis, presentation, and delivery. There are also several other hardware issues to address, and the additional analytical requirements are daunting to say the least.

Managing massive amounts of audio

Even at the lowest-quality setting (which is fine for voice recording), digital audio consumes mass quantities of hard disk space, roughly 40MB per hour. For 600 respondents, a voice-capture survey which records just one minute of audio from each requires close to half a gigabyte of data storage. Two minutes per survey starts to max out most computer networks; three minutes would bring most older networks to their knees. This, of course, assumes the interviewers are working on only one study at a time - running

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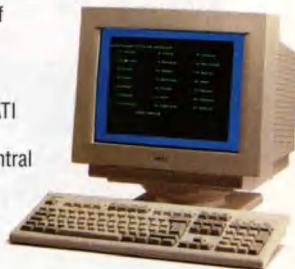
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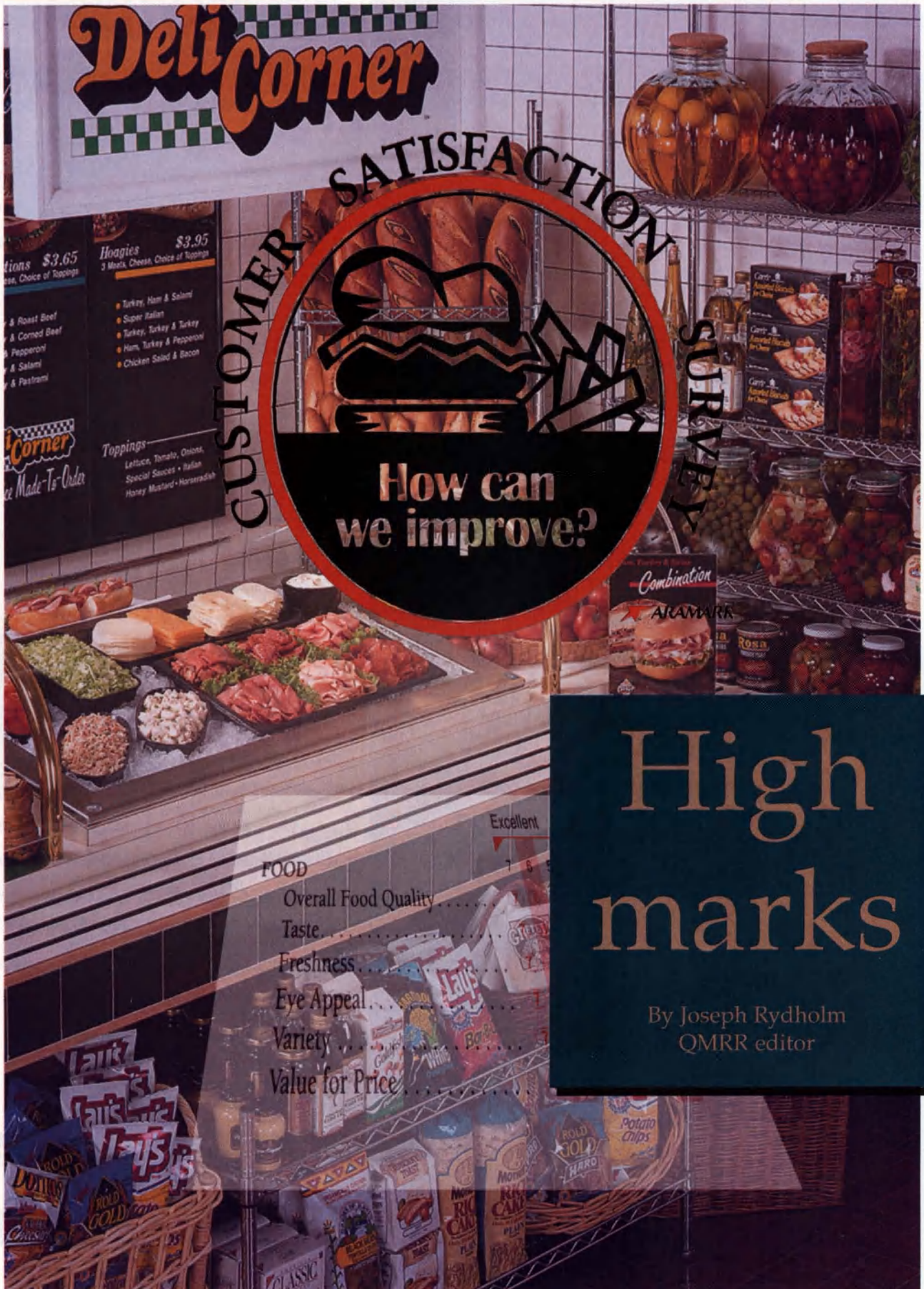
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By Joseph Rydholm
QMRR editor

Dining customers use scannable forms to tell ARAMARK how it can improve

As part of its \$4.5 billion food and support services business, ARAMARK, a Philadelphia-based managed services company, provides cafeteria and dining services in approximately 750 locations for companies such as Xerox, Ford, General Motors, and a host of others.

That amounts to about 1.5 million customers daily. To keep all those stomachs happy, each fall for the past seven years ARAMARK has distributed nearly a million scannable survey forms to patrons and employees of its dining facilities around the country. "The survey gives us a good indication of how the end-user customer feels about our service and by using a derived importance measure we can determine the importance of each attribute," says Mark Roberts, director of business planning, ARAMARK.

"We create a Performance Improvement Planner, which is a mapping of importance and performance for 25 major points of menu, service and dining environment. It shows managers where they rank in performance and how important each particular attribute is, so they can spend time fixing things that we're not doing well," Roberts says.

Through the We Heard You program, ARAMARK managers let cus-



tomers of the dining facilities know that ARAMARK cares about their opinions. Posters and stationery with the We Heard You banner are used to display specific actions the facility has taken in response to customer opinions. For example, Roberts says, "We can say to them, 'We heard you don't like where the salad bar is. Beginning next week it will be over there.' In other words, here's what you said, here's what we're doing about it."

In addition, some modules of ARAMARK's World-Class Training program for unit-level managers and staff relate directly to questions from the customer survey, which helps drive satisfaction improvement by focusing employee attention on things that are important to customers. "It allows us to pinpoint our efforts and maximize the impact of the time spent training," Roberts says.

"Very often an improvement in a

key area is targeted in our managers' performance plans, so in terms of the management development review, we'll say, 'You must improve your customer service scores in this area by this amount.'"

Turnkey kits

The survey forms are printed and processed by NCS, a Minneapolis research and consulting firm. "NCS creates a series of turnkey kits for us, including surveys, promotional posters and register toppers. They are sent to the managers, who set them up and run the survey for a week and then put the surveys back in the return mailers for shipment to NCS," Roberts says.

In most cases, says Renee Kostner, NCS senior project manager, the surveys are distributed at the cash register. Some sites offer a cookie as an incentive for completing the survey. A few distribute them via interoffice mail.

There are multiple versions of the survey form, including the employee surveys, the customer surveys, English and Spanish versions and regional versions.

The questions fall into three categories:

- food — including overall quality, taste, appearance, value for price, etc.;
- service quality — courtesy of staff, appearance, knowledge of

continued on p. 60

Designing effective telephone interviews:

objectives in the script development process

By Wendy Jones

Editor's note: Wendy Jones is vice president of client services, Sky Alland Marketing, Columbia, Md.

Designing an effective telephone interview is a crucial part of every marketing research effort. In many ways, the success of the program depends on an interview that

captures the right data, is easily and positively administered to customers and prospects, and does so effectively from the first day the program goes on-line. Of course, the real art is in designing a conversation around the consumer.

There is no hard and fast definition of a good telephone interview, but a

good interview should measure all the right things and do so efficiently. The script should flow smoothly and the questions should be conversational. The interview should be brief and the questions clear, straightforward and not leading or repetitive. Above all else, the interview should be designed around the customer and his

or her needs.

When our firm, Sky Alland Marketing, starts a new customer relationship management (CRM) or marketing research program with a client, designing the interview is one of the first steps. Although not all CRM programs use an "interview" per se (some programs serve to welcome customers, manage leads or fulfill product or literature requests) telephone interviews are crucial to any relationship marketing program with research objectives.

While interview design varies depending on program objectives, the client and, of course, the customer, the following are basic steps we follow in the interview scripting process.

Initial planning

Our first step is usually to arrange a planning meeting with the client to discuss the goals of the program and what they want to accomplish with the interview. These will vary depending on the kind of program they are initiating. It could be customer satisfaction measurement, marketing research, customer retention, channel management or some other type of customer relationship management program. We consider the purpose of the call, which can include measuring customer satisfaction, encouraging customers to activate a new credit card, tracking awareness of a product, or identifying drivers that affect purchases or defections. These goals can vary widely and will affect the type of information we attempt to capture with the interview.

During the planning meeting, we determine the survey geography and eligible respondents. Our approach will vary depending on whether respondents are customers, prospects

or non-customers. Sometimes the client provides us with a demographic profile of the intended respondent, although this is not always required. Demographics can include gender, age and any specific screening criteria, for example whether the respondent has traveled in the past year or if they are satisfied or dissatisfied customers. The client may provide background or collateral material such as brochures customers may be calling about. The customer profile and program goals drive how we script the call, as will what we want to measure.

finished questionnaire.

How long should the interview be?

Interview length and format depends on the type of call. For example, welcome calls tend to range from three-and-a-half to five minutes. A welcome call is more open-ended and we do more of the talking, providing information and thanking the client for their business. For customer satisfaction calls, we try to keep the call brief and aim for a range of three to four minutes. Research calls are typically longer and can take from five to 10 minutes.

A good interview should measure all the right things and do so efficiently. The script should flow smoothly and the questions should be conversational. The interview should be brief and the questions clear, straightforward and not leading or repetitive. Above all else, the interview should be designed around the customer and his or her needs.

We talk about what the client wants to measure and discuss the kinds of questions to ask. On some occasions, the client may ask us to review a script they have used in the past. After meeting with the client and establishing goals, we design a questionnaire and circulate it for review and revision. This process can take from three days to two weeks from the initial meeting to the

Customer satisfaction calls and research calls involve more listening. Keep in mind that these are average ranges; interview objectives should dictate length.

The questions

What kind of questions to ask depends on program goals and what kind of reporting and analysis the

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CATI systems:



Should you lease or buy?

By Henry A. Copeland

Editor's note: Henry Copeland is president of PTT Systems, Inc., North American agents for Pulse Train Technology, Ltd., a maker of research software and products. He can be reached at 561-842-4000.

There are a wide variety of computer-assisted telephone interviewing (CATI) systems available today to companies who use telephone interviewing to conduct market research.

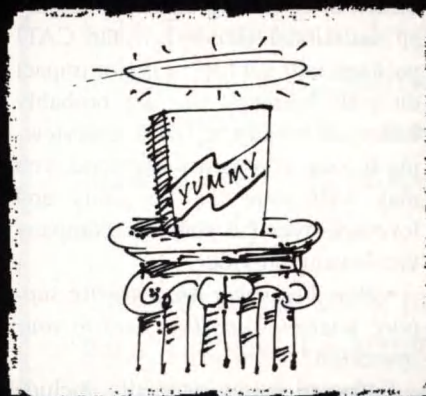
There are also many differences in the features, capabilities and costs of CATI systems, and it is often difficult to define the appropriate criteria to base a decision on.

The first priority should be to select the CATI system which is best for your company based on your company's specific needs and the features, capabilities and software support offered by the systems you evaluate. Once you've made a decision on the

system that is best for your company, you may then be faced with a lease-or-buy option.

The purpose of this article is not to help decide which CATI system is best for your needs, but to provide a basis for deciding whether the system you choose should be purchased or leased once the CATI software decision is made. Of course, you may not have to decide whether to lease or buy: Some CATI systems are available only on a

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lease basis, some systems can only be purchased for a one-time price, but others can be obtained either way.

The simplistic view of leasing versus buying is that a one-time purchase price should be cheaper in the long run versus paying a monthly lease price for an indefinite period of time, if only because a single purchase price puts a ceiling on the amount of money you will pay to the software company, while a lease is open-ended. But there are many considerations in the lease-versus-buy decision that aren't obvious at first glance.

Here are some questions to ask yourself considering whether to lease or buy CATI software:

- *How much does the software package cost?*

If the price is small, why bother leasing? On the other hand, for a very expensive package, leasing may be the only affordable option.

- *Does the purchase price include support and upgrades?*

If yes, for how long? How much do support and upgrades cost once the initial period runs out? And once you add in the support and upgrade costs, how long does it take for the lease costs to exceed your capital outlay plus support fees? If the answer to this last question is several years, you

may find it is actually cheaper to lease.

- *How likely is it you'll want to switch to a different package if something better comes along or if the software vendor doesn't live up to your expectations?*

If you buy the software, you own it. If it later turns out the system is not as up-to-date or is not adequate to meet your needs, you may be stuck with it. On the other hand, a good CATI lease gives you the flexibility to drop it on relatively short notice. This gives you valuable leverage over your software supplier to make sure it lives up to your expectations.

- *How important is the software package to your business?*

Is CATI interviewing your major means of collecting data or is it only an occasional activity? If the CATI package will not have a major impact on your business, you are probably better off buying; if CATI interviewing is your company's lifeblood, you may well want the flexibility and leverage over the software company that leasing provides.

- *How important are software support, upgrades and bug fixes to your operation?*

Software leases generally include full software support, upgrades and bug fixes as part of the package. Purchase prices typically include a limited period of time for support and upgrades; after the initial period, you must pay for them. On the other hand, leases generally include free upgrades and support on a continuing basis.

- *How complex are your questionnaires, sampling plan, interviewer*

management and CATI scripts?

If your scripts and sampling plans are straightforward with few complications, perhaps you don't need the extra interest and support that come with leasing a system. If you regularly conduct complicated or highly sophisticated studies, you may find leasing to be an attractive way to ensure a responsive support effort in the years to come.

- *What role do you expect your software supplier to play in your business?*

Are you looking for a partnering role where the vendor takes an active interest in your CATI operation, or do you simply want the existing software to work as advertised? Again, if you only need the features and capabilities currently offered, a purchase price is almost certainly cheaper. Most studies today, however, are much more complex and involved than studies done five or 10 years ago. Technology has certainly played a role in this trend; and after all, software technology is what you are buying when you select a new CATI system.

- *Is your company cash-rich or looking for financing?*

Leasing your software generally requires no money down for the software while a purchase price for good software for 30, 50 or more stations can be quite high. Some companies prefer to finance the software much the same way as hardware (i.e., with an outright cash purchase, through a bank loan, or by using an outside leasing company). Most software companies don't offer a lease with an option to buy; you must decide for yourself which is best for you.

- *If your vendor offers both a lease and a purchase price, what is the "multiple" of the purchase price compared to the monthly lease price?*

If your proposed lease payments total more than the purchase price in a very short period of time, you would be foolish to make lease payments indefinitely. On the other hand, leasing can be a very economical way to finance what would otherwise be an expensive purchase.

- *How flexible is the leasing option?*

Can you add to or reduce the num-

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ber of stations you use? A purchase means just that: you buy the number of stations you need (or think you need). If you need additional stations, even for a short period of time for a single project, you must buy more stations from the software vendor. A lease arrangement may allow you to add or subtract stations as your business grows or your business needs change.

- *Is the software a mature package with few features being added each year, or is it developing on a continuous basis?*

How much do you really need the upgrades as the software evolves? It makes no sense to lease a system that isn't evolving; you may as well buy it. On the other hand, continuous addition of new features and capabilities you can really use in your business are valuable attributes of a good leased system.

- *If you purchase the software, do you trust the software company to be responsive to your needs for support, bug fixes and upgrades after it has all your software money?*

A good software company will always be responsive to all of its clients, regardless of whether they have purchased or leased. On the other hand, it is only human nature to serve your current clients (those who pay every month) a little better than one who has already paid everything he is going to pay to the company.

Another consideration that is not often obvious at first glance in the lease versus buy decision is how long do you expect the software company to be around? Companies that sell their software collect the entire revenue stream from your purchase in advance. Once you buy, the only additional revenues the company generates from your purchase are relatively modest continuing support charges and software additions. On the other hand, a lease gives the software company less money up front, but provides a continuing revenue stream to keep support people on the job.

These are some of the questions you might ask before deciding whether to lease or buy. Only you can decide the best course for your company. □



Is your research up to par? In golf, par is the score that, in theory, an average player would take to complete a hole. Two strokes under par is an eagle. In the game of research, all participants in the interviewing process want to believe their research soared like an eagle. In reality, the research project may be a "bogey" (one over par and not perfect).

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Outsource it or keep it in-house?

By Ron Sellers

Editor's note: Ron Sellers is president of Ellison Research in Phoenix, Ariz. He can be reached at 602-493-3500, or at ronsellers@ellisonresearch.com.

To outsource or not to outsource? That is the question. And it's one that comes up frequently with companies and organizations that rely on marketing research. Is the organization better served by outsourcing its project work to experienced vendors, or should it build that expertise in-house, and rely on vendors mostly for fieldwork?

Some organizations do nearly everything in-house, including project design, multivariate analysis, and focus group moderating. Others act more as consultants or coordinators, managing the process between their internal client and the external vendor that is handling most of the actual project work. Still others rely on both models, and choose which direction to go on a situational basis.

Organizations that conduct relatively little research are generally better served outsourcing the work, as they usually lack anyone in-house with the necessary expertise. But which approach is better for organizations that use research frequently? From talking with researchers, it quickly becomes apparent that there is no right answer. The options come with a series of advantages, disadvantages, and trade-offs.

Staffing issues

The decision of whether to outsource most of the project work often comes down to the overall company philosophy about staffing. "One of our core values was keeping costs at a minimum," says Julie Davis, who for 10 years was in charge of research for a major midwestern bank. "The thinking was that we could staff minimally, and then find outside resources to do the work, and

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Hibernia National Bank in New Orleans takes somewhat the same approach to research, although it does support some of its projects internally. Its decision on whether to outsource a project often comes down to available staff and expertise, says Janet Leigh Cambon, Hibernia's manager of strategic research. For instance, she says, "If internal clients are waiting for us to write the report, staffing could be an issue in getting it out on a timely basis."

Angela Long, Hibernia's senior strategic research consultant adds, "We don't have a pool of experienced moderators who work for us internally, so we usually use external moderators. Focus group reports are very difficult and time-consuming to write," and staff members can spend their time on activities that must be done internally.

Another advantage of outsourcing is that if budgets need to be slashed during a tough financial period, it's much easier to cut project budgets than to lay off employees — and when the financial crunch eases and budgets are back to normal, it's also much easier to pick up where you left off with external vendors than it is to go out and find new staff.

Building intellectual capital

Although staffing issues would seem to point to outsourcing as the way to go, there's another point to consider: One real benefit to having in-house researchers is that they build intellectual capital in the organization. The idea is that increasing the knowledge level of employees is just as valuable as making capital expenditures on equipment or materials that enhance productivity and efficiency. When the organization has a staff of research experts who are constantly evaluating key strategies and findings, those people become in-house experts who can go beyond a pure research function and serve as consultants who apply their growing knowledge to serve the company in

ways that aren't directly related to specific research projects. This capability is not as readily available when much of the project work is outsourced.

Who has the expertise?

Internal researchers and external vendors will both have areas of expertise. The question is, what kind of expertise is more important? When you link up with good vendors, "You get the knowledge and expertise that they have built up by working across different industries. I think that's really valuable," says Davis.

Hibernia's Angela Long agrees. "I am usually so impressed with the scope and experience a really good outside vendor brings to the project — our better vendors will add a lot to the project through that experience."

In most cases, vendors will have tackled research projects far broader than those experienced by most in-house researchers at a client organization. In addition, good vendors can apply things they have learned from other clients (techniques, not information) to make a project run more efficiently and more effectively.

But there is a trade-off. It is unlikely that a vendor will ever understand a client's situation as well as that client's own employees do. Elizabeth Stewart, director of market research for the American Red Cross, says of her organization's decision to build a department in-house, "The major benefit is the understanding of the organization, and the ability to translate the data into strategy that addresses the business problem." She feels that vendors generally won't have this ability as strongly as internal consultants.

Davis agrees that this can be a deficiency of outsourcing. "Unless you have someone inside the company who's willing to work closely with the vendor, you don't get the value you need out of the research. The vendor won't understand enough about your business, or they don't know the nuances of interpretation, or the organizational changes that are driving a decision," she says.

There's no perfect world. With outsourcing you get a broad range of experiences that usually aren't available internally. With internal work, you get a deeper knowledge of your organization and its needs.

External = expert?

Another important factor related to outsourcing is how the internal client perceives the work of internal experts versus external vendors. In some organizations, internal consultants are respected for their knowledge of the company and its goals. And, although it may sound Dilbert-esque, stories abound of employees who leave to become consultants and are suddenly perceived as experts — even though what they say as a consultant is the same thing they were saying six months ago as an employee. In some organizations, the recommendations of an external consultant carry far more weight than those of an employee.

The key is to know the organization you're working for and the people involved. In the case of the Red Cross, Stewart says, "We have used consultants in the past, and there is a recognition that they are a credible source — but that doesn't mean the internal source is not seen as credible."

An offshoot of this is that having a vendor conduct the analysis and make the presentation insulates internal staff from any perception of bias, or from the "shoot the messenger" situation. "I liked to have the vendor do the presentation, partly because then I could avoid being the bearer of bad tidings," Davis says. "I needed to continue working at that bank after a project was done, and having vendors present controversial or unexpected results made it seem less partisan, plus I didn't get a reputation of being a naysayer."

Beyond personal reputation, this type of insulation can mean greater credibility for the internal researcher when he or she works to implement changes arising from important — but not necessarily popular — findings.

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Capacity, flexibility, and emergencies

Outsourcing is also a trade-off when it comes to time use. Doing project work internally means your organization can set priorities more easily. "Occasionally, we have a certain vendor we want to work with, and they're booked. If that were our employee, we could shift their work load and assign their priorities," says Long.

With internal work, the competition for the staff's time is from other internal projects. With a vendor, the competition is from other clients, and sometimes this means lack of availability. Having more than one vendor who can do a certain kind of work will help avoid this but there will certainly be times when all the vendors you use for multivariate analysis are booked solid.

At the same time, with the occasional exception, outsourcing still provides greater overall flexibility. When four big projects come up, you simply spend more money to hire vendors to handle the work. You could give all four projects to one

vendor, or contract with four different vendors. One quarter you can outsource \$10,000 worth of work; the next, \$200,000 — all while staying at the same staffing levels.

And, as Cambon points out, "When you're in a crunch, you can call on vendors to drop everything and do something for you," because they want to keep the client happy. "It's almost like having a temporary staff — it's someone I rely on in crunch time as much as I rely on salaried employees."

Although vendors don't always like it when clients think this way, the simple truth is that it's also easier to get a vendor to work the whole weekend than to put that expectation on a staff member.

In doing work internally, "Prioritize what's important for the corporation, and then make a decision on what can be done internally and what can be done externally," Stewart advises. "I find that at the Red Cross the analysis and the recommendations and the translation from data to strategy is very, very critical, so that's my prima-

ry focus." This focus means sometimes other things have to get outsourced.

Finding the right people

Whether you're looking for the right staff member or the right vendor, it can be a challenge to find competent resources for your research needs. Organizations that do a lot of outsourcing often have three to six vendors they might rely on for any given type of work. If one goes out of business, or a key person leaves, there are still other vendors available (and hundreds more who would like to have a shot at the work).

With internal project work, if a key staff member leaves, it's a different story. It means your organization has lost intellectual capital it has built up over the years (and maybe lost it to a competitor). It means money to find, hire, and train a new person. It means other people have to take up the slack (if possible). And it could mean going weeks or months without a qualified staff person in that position. Particularly right now, Stewart notes, recruitment is very difficult because of the tight labor market. Vendors, on the other hand, are easier to find and hire than employees, and easier to fire if things simply don't work out.

Control issues

Outsourcing can mean somewhat less control over the work than you would have with an internal staff. In managing a research staff, you have daily input regarding their work, their research education, their time use, their department in meetings, etc. You can aim to have work done the same way each time, and shore up the weaknesses of a particular employee in any given area.

Vendors, on the other hand, often have their own way of doing things, and it can sometimes be difficult for them to adjust to your exacting needs (especially if 10 other clients are clamoring to have the vendor do things their way). Some vendors also see themselves as experts who are there to guide the client, which means it can be a battle getting things done

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the way you want them. Having internal staff doesn't solve this problem, but it gives greater daily control over these issues.

Both Davis and Cambon point out that when internal clients see the research department outsourcing work to vendors, they can easily get the feeling that it's okay to sidestep the internal department and work directly with a vendor. Another problem is that vendors will sometimes do the same thing, going directly to internal clients with promotions or research ideas. This is rarely a problem if clients know all project work is done by the internal research staff.

Implementing the findings

Outsourcing work can be a disadvantage once it's time to implement the findings. If an internal researcher did the project work, depending on how the organization is set up, that researcher can become part of an ongoing project team to put the findings to work. This is usually not as easy to accomplish with a vendor.

Hibernia has developed a system to help overcome this, Long says. "We had some of our executive managers tell us that vendor reports often left them with a 'what now?' kind of feeling. They didn't know how to use the information. Now, once we have the report from the vendor, we let the vendor present it in his or her own style, but we give it our own executive summary. We also include a section on what should be done, and how the manager should use this research information."

Cambon says this approach makes the research more user-friendly to Hibernia's internal customers.

No consensus

There is no consensus on the question of whether to outsource or build internal capabilities. "Analysis should be done internally — that's why we're hiring high-level people," Stewart says. "Many vendors don't have enough of an understanding of the organization and its business problems to be able to translate the data into action."

"It would be really hard for me to find a disadvantage to working with a good outside vendor," counters Cambon.

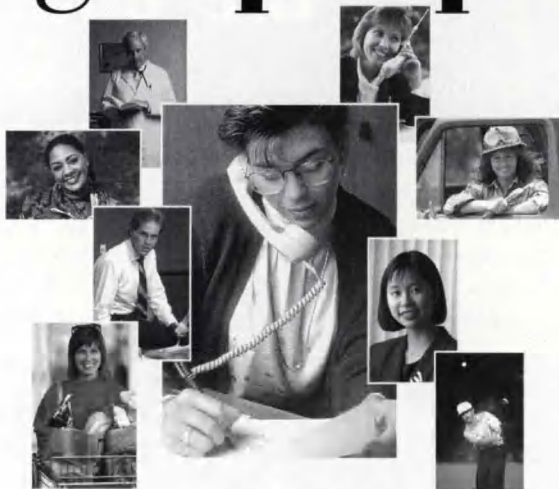
"Vendors save us time, they bring greater experience and expertise to the project, they are reliable, and they keep us from having to add on more staff," Long says.

All agree that no organization is well served by having research staff simply coordinate all the projects and hand them off to a vendor. Outsourcing only works well if there is some internal control and if value-

added services are provided by research staff. "There's a lot of work in integrating all of the pieces — and if you can't do that, it's not going to work," Cambon says.

In putting research to work for your organization, there may not be an obvious decision in the question of whether or not to outsource. The key is to understand the advantages and disadvantages of each approach, so you can capitalize on the advantages, and work to overcome the disadvantages, no matter which approach your organization selects. □

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Using virtual reality-based conjoint to capture the voice of the customer

By Lisa Wood, Dean Hering, Mohan Bala and Todd Romig

Editor's note: Lisa Wood is the director of the Decision and Market Analysis program at Research Triangle Institute (Research Triangle Park, N.C.), which conducts new product preference studies. Dean Hering is a senior engineer in the Center for Digital Systems Engineering at Research Triangle Institute. Mohan Bala is a management scientist in the Decision and Market Analysis Program at Research Triangle Institute. Todd Romig is a product manager at Volvo GM Heavy Truck, Greensboro, N.C.

When preferences for a new product are fairly well known (e.g., line extensions for consumer products), decisions about whether to offer the actual product often can be made with some confidence. However, when demand for a new product is highly uncertain and prototypes are expensive to develop — as with very new durable products

— an approach where potential customers evaluate hypothetical products can be very useful. In this article, we describe how Research Triangle Institute (RTI) used a new tool — TradeOff VR™, which combines conjoint analysis and virtual reality (VR) — to capture the voice of the customer in the product design and planning process for a new refuse truck at Volvo GM Heavy Truck (VGHT).

Conjoint analysis is a quantitative market research technique for eliciting customer preferences for a set of product profiles where a product is defined as a set of features or attributes. Using conjoint analysis, we statistically estimate customer preferences for the product features or attributes based on customer evaluations of a set of product alternatives defined in terms of levels of different features. This technique has been used extensively by market researchers to gather information on customer preferences for new product features^{1,2}.

Conjoint analysis for new product design typically consists of the following steps:

- Define the product in terms of its features or attributes, design conjoint interview, and use interview to collect data on customer preferences for the product features.

- Statistically estimate a customer preference or utility function that quantifies the relationship between customer preferences and each of the product features.

- Use the following results in the product design process:

- Estimated weights for levels of each feature

- Importance weights for each product feature

- Preference shares for each hypothetical new product and most preferred product design

Figure 1 shows the basic steps in a conjoint analysis study.

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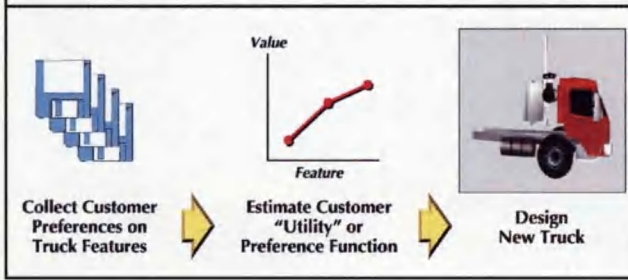
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tomer in the quality function deployment (QFD) process has been introduced³. QFD begins with defining customer attributes or customer

ucts, it may be difficult for respondents to answer such questions. The addition of VR to the conjoint interview

Figure 1: Basic Steps in a Conjoint Analysis Study



requirements and then estimating a relative importance weight for each attribute or feature⁴. Conjoint analysis is one technique for statistically estimating the relative importance of each attribute and thereby capturing the voice of the customer in a consistent, structured, and quantitative way. In a traditional conjoint interview, product features are described to the respondent and the respondent is asked a preference question. For very new products or for unfamiliar prod-

ucts, it may be difficult for respondents to answer such questions. The addition of VR to the conjoint interview

- allows us to more realistically capture the voice of the customer in the product planning and design process. In particular, by using VR-based conjoint we can:
- allow the customer to see and interact with a visual 3D virtual version of the product;
 - configure and gather customer reactions to multiple virtual products; and
 - design the customer's most preferred product visually and in real time.

allows us to more realistically capture the voice of the customer in the product

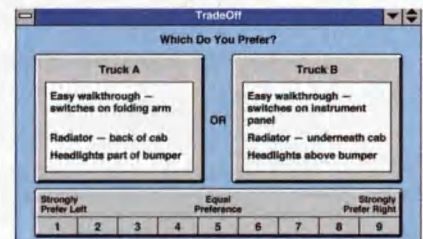
Figure 2: Features and Levels for Hypothetical Refuse Truck

- Interior Walkthrough
 - ✓ Hard walkthrough — switches on engine tunnel
 - ✓ Easy walkthrough — switches on instrument panel
 - ✓ Easy walkthrough — switches on folding arm
- Remote-Mounted Radiator
 - ✓ Back of cab
 - ✓ Underneath cab
- Front Bumper
 - ✓ Headlights part of bumper
 - ✓ Headlights above bumper
- Front Windshield
 - ✓ One piece
 - ✓ Two piece
- Rear Windshield
 - ✓ Standard
 - ✓ More wraparound
- Price
 - ✓ \$60,000
 - ✓ \$70,000
 - ✓ \$80,000

Example application

Figure 2 shows a set of features and levels for a hypothetical new refuse truck. In this example, we've defined six different features of the truck. Each feature has two or three levels or options. For example, the remote-mounted radiator can be in back of the cab or underneath the cab. Figure 3

Figure 3: Traditional Conjoint Trade-Off Question



shows a traditional conjoint interview question for the hypothetical truck in a trade-off format. In a traditional conjoint interview, respondents would respond to a series of such trade-off questions. The difficulty with such a series of questions is that the respondent has to visualize or imagine what these features actually look like. That's where VR comes in. VR depicts objects in a 3D virtual environment and allows respondents to explore a product's features in detail. The illustration on p. 34 shows an

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example of the interior of a hypothetical truck in a VR environment. In this case, the respondent can look around inside the truck, look out the windshield, turn around in the truck to look out the back window, and sit in the driver's seat. The respondent can also click on a button to move outside the truck and view the exterior.

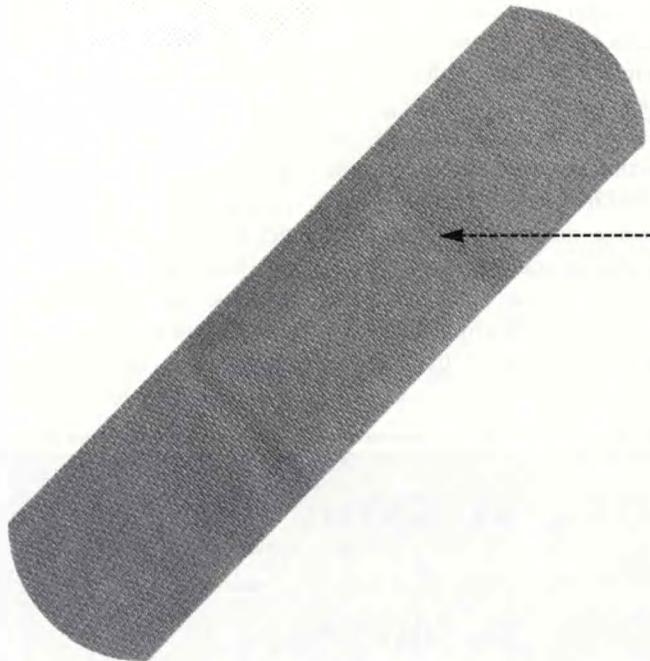
In addition to showing virtual products in a 3D environment, by using VR-based conjoint we can allow respondents to interact with the product features — push buttons, turn objects around, and try out some of the features. Also, when appropriate, we can immerse the respondent in an environment. For the refuse truck, it made sense to immerse respondents in the interior of the truck since being in the interior most closely mimics the real world environment for decision-making.

Producing the virtual environment for the VGHT truck began by optimizing VGHT's existing preliminary truck CAD data to 3D computer models suitable for interactive virtual environments. Each feature of the truck occupies a separate model so that the truck may be built from the appropriate collection of models. We modeled features that did not yet exist in design form in consultation with VGHT visionaries. By modeling each feature as a separate 3D object, it is easy to build any combination of features into a truck necessary for gathering voice of the customer data. For example, for each trade-off question in the conjoint interview, the software configures the truck as a collection of features based on the conjoint interview design.

This modular design also allows for easy changes to the system. For instance, if VGHT changes or adds a feature, the model for that feature is changed or added and the system incorporates the change automatically. By changing a text file, the system can add or remove any number of features desired. This allows for an extremely flexible system for use in future customer data collection.

The same configuration system that we use for displaying the questions and allowing the user to interact with the virtual product is also used for con-

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figuring the final virtual product in real time based on the customer's responses to the conjoint questions. This means that, following the interview, the system immediately builds the customer's most preferred product and the customer can interact with the product in the same manner as when answering the trade-off questions.

By using existing design data, TradeOff VR can be easily integrated into the product design process as well as the market research process. Virtual prototypes can be developed as quickly as they are designed and at a substantially reduced cost from physical prototypes. Producing a physical prototype for each feature of a new refuse truck, for example, is not economically feasible; additionally, changes are time-consuming and costly. With a virtual prototype, we change the design and update the model, and the customer sees the new change in a matter of hours, rather than weeks or months. In addition, color, texture, and other cosmetic changes can be made almost instantly and incorporated into the system automatically.

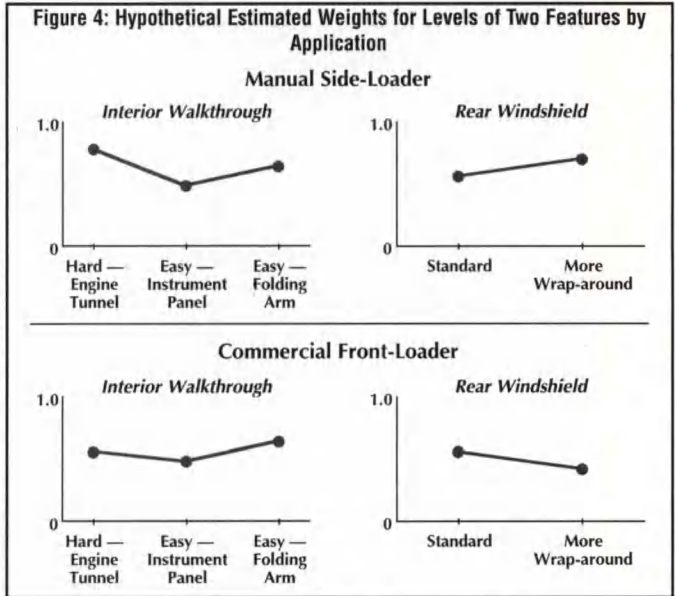
Data collection

VGHT presented the 45-minute VR-based conjoint interview to groups of customers in a conference room setting, thereby allowing multiple decision-makers from a single company to respond to the interview. The interview was projected from a PC onto a screen and each customer responded to a series of questions about four different applications of the refuse truck using a wireless polling device. At the conclusion of the interview, the software configured the group's most preferred product for each of the four applications based on statistical estimation of the responses to the trade-off ques-

tions. The system also allowed VGHT to connect a head-mounted display to the computer so that the customer could look around inside a typical truck interior.

Hypothetical results

Below we provide examples of the types of results that can be generated



based on the information collected during the conjoint interviews. All of the results are hypothetical and do not represent the actual data collected by VGHT.

Figure 4 shows the hypothetical estimated weights for levels of two features for two applications — manual side-loader and commercial front-loader. The weight associated with a particular level of a feature is a measure of its value to the customer; hence, the y-axis represents the value or utility associated with the levels for each feature. For example, the results for the Interior Walkthrough feature suggest that customers prefer a hard walkthrough with switches on the engine tunnel over either of the easy walkthrough possibilities for the manual side-loader.

Figure 5 shows hypothetical importance weights for each product feature for the same two applications. These results show, for example, that price is the most important feature to customers for the manual side-loader. For the commercial front-loader, both price and remote-mounted radiator are important features. For both applica-

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tions, the front windshield — whether one piece or two piece — is not that important.

Examining the interior features, we found that customers prefer a hard walkthrough with switches on the engine tunnel and a rear window with more wrap-around for the manual side-loader application. For the com-

mercial front-loader, customers prefer an easy walkthrough with switches on the folding arm and a standard rear window. These results are consistent with the estimated weights for the levels of each feature as well as

Powerful tool

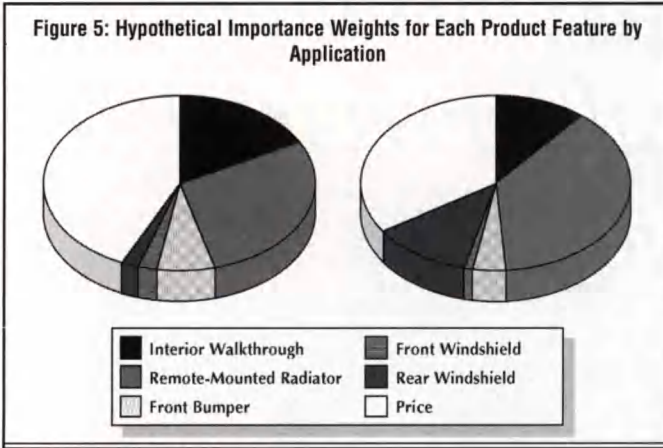
This study shows how companies can use VR-based conjoint to capture the voice of the customer in the product planning and design process. In particular, we demonstrated that combining a structured and quantitative

preference elicitation technique such as conjoint analysis with visualization is a powerful tool for obtaining customer feedback on hypothetical virtual product features before the products or even the prototypes are ever developed. This type of tool can be integrated into the new product development process and can significantly reduce new product development times⁵. The virtual prototypes are based on the CAD data gen-

erated for the real product design and allow for product visualization and feature evaluation early in the design phases, saving time and development costs. Because the system assembles the product from 3D models in real time, we can introduce changes, new product features, or entirely new products easily and economically. By allowing customers to interact with a virtual visual product, companies can approach the reality of market-testing true prototype products. □

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mercial front-loader, customers prefer an easy walkthrough with switches on the folding arm and a standard rear window. These results are consistent with the estimated weights for the levels of each feature as well as

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Beyond human oddities: how to mine consumer brains to build powerful brands

By Tracy Teweles

Editor's note: Tracy Teweles is a vice president at C&R Research in Chicago. She can be reached at 312-828-9200.

I have a personal relationship with my brand of toilet paper. Call me crazy. It goes beyond expecting softness and wanting a "name I can trust." It has to do with stuff I would never tell you about — things like how I want you to see me ("I'm not overly fancy. I'm practical."). And, how I want to feel.

And you know, nothing makes me feel that my life is in order like stow-

ing six to 12 extra rolls in my closet. Let it get down to two or three and I feel a little nervous. You probably do too.

To put all this in marketing-ese, I can say that I interact with my toilet paper on three levels — on a physical level, on an image level, and on an emotional level. And all three of these work to reinforce my brand choice.

So rather than looking at consumers and their interaction with products and categories as a one-way street, I like to look at it as a full, two-way thoroughfare. A full-fledged interaction.

Where I'm a bit different than some

folks out there is that I believe these insights are more than odd — they are valuable; that is, understanding our underlying relationship with brands and categories can provide marketers with powerful instruments for building meaningful brands. Brands that consumers will naturally be drawn to because they build upon natural behaviors and relationships. Relationships we are all but unaware of.

The idea of this article is not to talk about my personal habits but to share my experience in working with ordinary consumers to mine their underly-

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ing category and brand experience in order to strengthen brands. We provide several services at C&R that leverage this experience through metaphorical and right-brain thinking.

I have mined the world of white and red meat, of toilet paper and soup, of utilities and pickles, of cable TV and fast-food burgers. And I have learned two things: the good news is that we all have these relationships with brands and categories; the bad news is that not every consumer can easily tap into this level of experience.

If you are interested in mining consumers' brains, there are three guidelines you may want to follow:

- zero in on the right consumers;
- build an intimate team environment; and,
- use a toolbox that allows people to articulate these underlying experiences and perceptions.

Zeroing in on the right consumer

Because the success of a project of this kind relies wholly upon respondents' ability to explore this uncharted territory with you, we need to be more

selective than for a traditional focus group. We've found a few things that make for a successful recruit:

- Articulate, articulate, articulate. While in real estate location is key, you can't get anywhere in understanding underlying stuff if you have a group of people who can't articulate their thoughts or experiences.

- Let's talk about me. Openness is essential too. We need to start out knowing that this will be a group of people who are relatively comfortable speaking about themselves.

- A bit to the right. While political views do not matter, rightness of brain does. We've got to be sure that our cohorts in exploration can defy the allure of logic and venture forth into right-brain or associative thinking. Stuff that requires no rationale. Free-flying fragments are welcomed here. And that's not necessarily your basic respondent — though more consumers have this ability than you might think.

Building an intimate environment

The right environment is also essential to delving into consumer depths.

Some things I've learned along the way:

- The only thing to fear. A key job as we explore new territory is to establish a setting of fun, not fear. It can be pretty scary to reveal habits with strangers; as a moderator my job is to provide permission for all thoughts and to make the process feel like cocktail party games rather than a psychological test.

- Group discovery, together. And, for this kind of process to work well it needs to be a joint venture. Between moderators and respondents, and between client and moderator. Learning won't be transparent; hypothesis is part of the process as the group progresses. This is part of the camaraderie and the uniqueness of this kind of venture. We are, as C&R's Founder Saul Ben-Zeev says, together with the respondents in the hot pursuit of learning. And respondents like that role — and power.

The moderator/client venture is truly a team effort too. We are working together to digest learning as we create a new language to describe things no one has ready words for.

- A buddy system. To bolster respondent comfort — and help them clearly articulate their associations and ideas — we typically pair consumers based upon their brand preference or habits with what we call Champion Pairs. Because they share a viewpoint, they bond as they work together. This makes their work more fun and engaging — and their ideas and private feelings seem less vulnerable. Thus, the results are more revealing and informative for us.

A toolbox of projective techniques

It ain't easy to talk about relationships with inanimate objects. So something is called for to help people express the automatic and the unnoticed in words.

This is where a bag of tricks is definitely called for. Straightforward, left-brain fare simply won't work. We need something that will provide a fresh expression of what's on automatic. Something that'll trick the dominant left-brain to ditch logic so emotion can come through.

This is the natural habitat for pro-

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jective techniques, a place where they thrive. These kind of techniques work in two steps: diverging — launching off into blue-sky stuff — and then, converging — bringing it all back home to marketing fare.

How to make projectives work for you

- **Critical mass:** go for quantity. While quality is surely an aim, in this kind of work, projectives work well in quantity.

- **Play *Highlights* magazine.** Remember those games where you try to see what three or four different images share in common? Well that's the idea here. By doing a series of projective technique, we can begin to see patterns. These patterns will lead us to define brand essence and the consumer-product relationship.

- **Build-in contrasts.** A projective is basically a metaphor, and a metaphor without a contrast or parameter is pretty useless. To learn that Soup A is homey doesn't tell you beans about the brand unless you're sure this isn't a category "price of entry."

- **By establishing some brand contrasts** you can be confident what realm you're really in, and understand what's brand-relevant and what are category issues.

- **Wonder.** Finally, don't forget the reason why. It seems like a silly point, but it can be really easy to assume that if consumers think of Pickle A as being like Neiman-Marcus, it must be the best pickle around. I've been surprised more than once by respondent's explanations — this could be the Neiman-Marcus of pickles because it's a big pickle and Neiman-Marcus is based in Texas, where everything is big. It could be like Neiman-Marcus because this man believes that Neiman-Marcus' stuff is just the same as JCPenney, but twice the price — so this is a parity product sold at a premium price.

- **Distill.** Once you've mined, you've got to refine. To digest and to order. Once you've done this, you'll have an organic understanding of your category, your brand, and just how consumers interrelate with both. What a great base for making a brand be all it can be. □

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Research about nothing

Is Kramer master of Jerry's domain?

By Dan Margherita

Editor's note: Dan Margherita is executive vice president of NCO TeleResearch, a Philadelphia research company. He can be reached at 610-352-5700 ext. 3589.

Earlier this year, as part of a national omnibus, TeleResearch, a Philadelphia research firm, included a series of questions prompted by the popularity of television's *Seinfeld*, addressing how the show's current ratings might be leveraged against future spin-offs (outside of syndication). What follows is a tongue-in-cheek presentation of the results.

[The scene opens with Jerry and George sitting across from each other in a booth at the coffee shop. Jerry is reading a copy of *Quirk's Marketing Research Review* that someone has left behind.]

JERRY: Hey! Look at this! They did a poll about our show, and asked who is the funniest character and who is the most popular character and all that.

GEORGE: I don't know much about doing a poll. . .

JERRY: You don't know much about climbing a pole, my friend!

GEORGE: Very funny. Who do they talk to in these polls, anyway? They never call me to do a poll!

JERRY: Says here they talked with 667 people nationally, of whom . . . wow! . . . 56 percent watch *Seinfeld* at least sometimes! Who do you think is the most popular character?

GEORGE: Me?

JERRY: Oh, you are pushing your luck, little man! No, it's Kramer! It says that 56 percent of the people say he is their favorite.

GEORGE: Kramer? What about the rest of us?

JERRY: Well, we're pretty much all together. I got 18 percent, Elaine got 13 percent and you got 12 percent.

GEORGE: [Outraged] Twelve percent? I only got 12 percent? So they like me the least? They . . . wait a minute . . . that only adds up to 99 percent. Who got the other 1 percent? Newman?

JERRY: No, I doubt that. I think they round these numbers off. Just calm down. Then they asked people how funny they thought each of us is.

GEORGE: AHA! Now we're getting somewhere! Who was on top this time?

JERRY: Better finish chewing first.

GEORGE: Why?

JERRY: It's the K-Man. Eighty percent think he's "extremely" or "very" funny.

GEORGE: [Sputtering, with tuna salad flying] Eighty percent? Where are the rest of us this time?

JERRY: Better wipe your chin first. Well, 56 percent think I'm funny and . . . get this! More people, in fact 51 percent, think you're funny compared to only 43 percent who think that Elaine is funny.

GEORGE: I'll bet the rest haven't seen her dance. Does everybody feel this way? What about men versus women, younger people, and all that stuff that they break these polls into?

JERRY: Good question. Maybe you know more about this polling stuff than you think, although I highly doubt it. Anyway, when it comes to Kramer, pretty much everybody feels that way . . . men, women, older and younger, richer and poorer . . .

GEORGE: Wait! It sounds like we're getting married here. So if there was a spin-off show, Kramer . . . that goof-ball . . . would be the logical choice? Unbelievable!

[KRAMER enters the coffee shop and joins them.]

JERRY: We're just reading about this poll that they did . . .

GEORGE: [interrupting and starting to shout] And it says that you're the most favorite, funniest character and the rest of us may as well just go off somewhere and die!

KRAMER: [calmly] No, no, George. My subscription to *Quirk's* came this morning and I read the article already. What they're really trying to say is that we're a team . . . an ensemble . . . and that all of us have an almost equal impact on the show's ratings.

GEORGE: Almost?

KRAMER: Well, Elaine was just a little bit behind the rest of us.

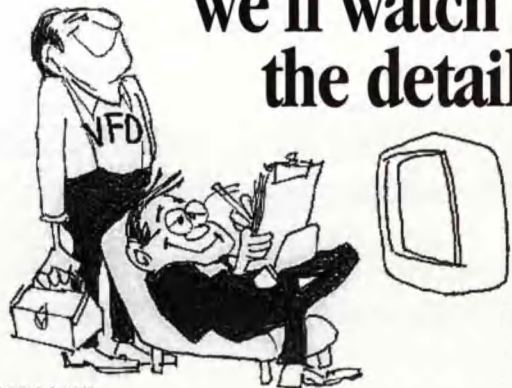
GEORGE: I guess people have seen her dance.

KRAMER: Well, maybe, but among frequent viewers, my impact on the show . . . mine, Cosmo Kramer's! . . . is just the same as yours and Elaine's!

JERRY: So your huge popularity doesn't necessarily translate into you having the largest impact on the ratings?

KRAMER: That's why this regression analysis stuff is so valuable. Each of us represents importance weights in the regression equation. You guys really ought to read up on

You watch your focus groups, we'll watch the details.



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this.

GEORGE: Since when do you know about regression weights?

KRAMER: I've had a lot of time to read since I've been on strike.

GEORGE: Of course. I thought the only reading material in your apartment opened up into a coffee table.

JERRY: Don't pay any attention to him. What you're saying is that, assuming that a spin-off show starring you would be based upon your popularity, it wouldn't essentially change your character. So the question is, would the show be basically all you, or would it have an ensemble cast like this one? If it's mainly you, the show could be very successful.

GEORGE: Yeah, but that might be taking a chance, right? If a show is based too much on one character, it loses the synergy of a full cast; plus, Kramer's, uh, eccentricity might not make him a good main character.

JERRY: What's that in your glass? Synergy? Aren't you the one who thought that's what you get from drinking Ovaltine?

GEORGE: I'm only looking out for myself here. The way I see it, if we all have an equal effect on ratings, and there's a strong ensemble cast, then a show starring my

character would be just as successful. After all, Jerry, united we stand, you know what I mean?

JERRY: And if we're talking about frequent viewers, this would even apply to Elaine. Amazing!

KRAMER: Until they saw her dance.

[ELAINE comes in, and joins the other three.]

ELAINE: Hey guys, what's up? What're you reading?

JERRY: Oh, just a poll about the show. It says you have to be careful how you look at our popularity and all.

ELAINE: Polls. I'm so tired of all these polls. "Who would you vote for?" "What hospital would you rather die in?" Yadda, yadda, yadda. Anyway, how'd I do?

GEORGE: Like he said, you have to be careful how you look at it.

ELAINE: What's that supposed to mean?

GEORGE: Well, if they did a spin-off show and built it around, say, Kramer there, it's possible that it would be more successful at first but, in the long run, a show starring me might be equally successful! How do you like that?

ELAINE: Get OUT! What about me?

JERRY: Maybe you'd better read the article first.

ELAINE: It's bad news, isn't it? That's why you keep wanting me to read it first, right? It mentions my dancing, doesn't it?

JERRY: No, it's not that bad, really. The good news is that you're very much a part of the team. In fact, it says that more women than men think you're funny.

ELAINE: I don't understand this. I'll bet that if it wasn't for this show, nobody would watch TV on Thursday night at all.

JERRY: Well, actually . . .

KRAMER: Better let me handle this one, Jerry. You'll screw it up. Elaine, there's a very low correlation between watching *Seinfeld* and the general frequency of television viewing. If the correlation were negative, it would be bad for NBC because it would imply that people watch TV just for us and a few other select shows.

GEORGE: So the audience would be lost forever when we go off the air?

ELAINE: Told ya!

KRAMER: But that's not the case here. There's almost a zero, actually a small positive, correlation so it's really good news for the peacock in that a good replacement show could still hold frequent TV viewers.

ELAINE: Where in the world did you learn all of this?

KRAMER: Hey, I'm Kramer! □

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Survey Monitor

continued from p. 6

nearly 39 babies born per thousand inhabitants compared with 28 in Egypt and just over 20 in Turkey.

Turkey is easily the region's most popular tourist destination: a record 9.7 million tourists visited in 1996, nearly three times as many as visited Egypt and a 22 percent increase over 1995. According to Euromonitor's statistics, Turkey is growing ever more popular, with the number of tourist arrivals rising by 15 percent every year. Egypt's tourist industry is also developing rapidly, though hindered by terrorist attacks on visitors. In the next century the Red Sea could be a common holiday destination: it is expected to attract half of Egypt's expected 10 million annual visitors by 2020. At least 90,000 hotel rooms must be built to accommodate these Red Sea tourists (more than the country's total capacity in 1996) and water will somehow have to be piped in from the already overburdened Nile.

Israel is also working hard to attract the tourist dollar. Provided peace is restored, the industry plans to cater to over 4.5 million annual visitors by 2006, necessitating 53,000 new hotel rooms (more than doubling today's total to 91,000.)

Euromonitor's study shows that Egyptians have the highest death rate, highest infant mortality rate, and highest unemployment rate in the region. However, they also have the highest marriage rate (8.7 per thousand people in 1995) and a slightly lower divorce rate than the Israelis (1.4 per thousand versus 1.5 per thousand). Israelis can expect to live longer than their neighbors: women live to nearly 80, while men can reach an average age of 75.5. Again, Egyptians are less fortunate, attaining an average age of only 63 and 61 respectively.

The Saudi Arabians are the Middle East's biggest meat-eaters, getting through over 50kg each in 1996. The Turks are the least carnivorous, eating an average of only 20kg each.

However, over half the Saudis' meat intake is poultry, whereas the Turks' main form of meat is beef and veal. In the UAE the most popular types of meat are lamb, mutton and goat.

To wash it down, residents of the United Arab Emirates lead the consumption of soft drinks at nearly 85

liters per capita in 1996. Egyptians are the most restrained, downing only 30 liters each, while the Israelis have a particular fondness for carbonated drinks: nearly 50 liters per person were drunk in 1996 compared with the 18 liters consumed by Turks and Egyptians. For more information

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More households using answering machines

More than 77 percent of America's households now have a telephone answering machine, according to a nationwide survey by Decision Analyst, Inc., an Arlington, Texas, research firm.

In its survey of 6,490 households, Decision Analyst found that 77.3 percent of U.S. households own an answering machine — an increase of roughly five percentage points since the first quarter of 1996.

"The answering machine is no longer a luxury. It has become a household utility, a necessity. It is perceived as valuable in screening out telemarketing calls as well as capturing those calls and messages that we don't want to miss," says Jerry W. Thomas, president and chief executive officer of Decision Analyst, Inc. "Overall, the household saturation levels suggest that the answering machine market will grow more slowly in the future, compared to the past five years."

The answering machine is particularly popular among younger consumers (85 percent of the 18-34 age group reported having a telephone answering device). Answering machines are least popular among those 55 years and older, where ownership drops to 67 percent.

The higher the household income is, the more likely that household is to own an answering machine. Eighty-seven percent of those earning at least \$50,000 reported owning the machines. Those earning under \$30,000 are least likely to have the machines, the survey shows. For more information call 817-640-6166.

If produce is convenient, it will sell

Convenience is the overwhelming theme for consumers in this time-crunched world, according to a new consumer study. People are buying more prepared meals and fresh-cut produce to ease the time crunch in

their busy lives.

More than one-third of consumers say they bought a prepared meal from a supermarket or grocery store in the past six months, according to "Fresh Trends 1998." The study also found consumers are eating up fresh-cut vegetables, fruit and salads.

"Fresh Trends 1998" has just been released by *The Packer*, a business newspaper serving the fresh produce industry, and Vance Research Services, each a part of Vance Publishing Corp., Lincolnshire, Ill.

In this trend toward prepared foods, consumers are not forgetting their produce. Nearly 75 percent of the prepared meals purchased from a supermarket or convenience store in the past six months included some type of produce.

Consumers' concerns about microbial contamination of fresh produce have risen dramatically in the last year. In a year where the media heavily covered several outbreaks of food borne illness, it is not surprising to find consumers have changed the way they buy produce and in some cases have stopped buying certain types of produce altogether.

Sixty percent of consumers say they are more concerned than they were 12 months ago about salmonella bacteria on fresh produce. Concerns about other bacterial contamination of fresh produce also have increased. Fifty-eight percent of consumers say they are more concerned about the issue than they were a year ago.

Some consumers have stopped buying strawberries and raspberries because of food safety concerns. Thirteen percent say they have stopped buying strawberries, and 7 percent say they have stopped buying raspberries.

Consumers are finding satisfaction in organic produce. More than one-fourth of consumers say they bought organic fresh produce in the past six months. Of those consumers, 98 percent say they were at least somewhat satisfied with their purchases.

Organic vegetables are the most popular purchases with tomatoes, lettuce and carrots leading the way. Significantly more people purchase

organic vegetables than purchase organic fruit.

Other topics covered in the study include fresh-cut, shopping habits and 5 a Day/nutrition.

Highlights from "Fresh Trends 1998" are available in a 92-page magazine for \$20. A full report, including demographic data, is available for \$200. To obtain a copy of the magazine or the report, write or call Carol Cox, The Packer, 10901 W. 84th Terrace, Lenexa, Kan., 66214. Phone 913-438-8700.

The coming age of digital TV

As television manufacturers get ready to launch the next generation of television — the digital TV — next year, findings of a new national study conducted by the market research subsidiary of St. Louis-based Aragon Consulting Group, a management consulting firm, reveal that many consumers initially may not make a bee-line to buy them.

Aragon reports that 57.8 percent of the respondents were aware of the changes taking place in the television industry prior to the survey. However, of those familiar with the television industry's evolution from analog to digital broadcasting, only 25.5 percent of those surveyed say that the timing of their next television purchase will be swayed by the switch to digital. When specifically asked when they plan to buy another television, only 2.3 percent of participants say that they will buy a new set once digital TVs become available in stores.

In total, 10.3 percent of those participating in the Aragon study say they will purchase a television set before next summer; 7.5 percent say they will buy one within the next one to five years; 2 percent say it will be six years or more; and 38.3 percent say whenever their current set breaks. The remaining 39.8 percent say they do not know when they will purchase their next set.

The Aragon study also shows that the average American household has 2.7 television sets, with the newest television set in any given home being

3.9 years old on average and the oldest being 9.4 years old on average. For homes with multiple numbers of televisions, the oldest is an average of 7.6 years where there are two or more televisions; 9.4 where there are three or more; 11.3 where there are four or more; and 10.3 where there are five or

more.

"Once again, research shows that although there may be some initial interest in a new technology, the novelty of it does not drive purchase decisions," says Gary Miller, chairman of Aragon Consulting Group.

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of time that consumers keep their old sets around, it's no surprise that more than half (53.3 percent) of those we surveyed say the federal government did not allow enough time for the nation to switch from analog to digital broadcasting," says Miller. Television manufacturers plan to roll the sets out in the stores in 1998, while the government is compelling broadcasters to make a complete transition to digital by 2006. In the meantime, broadcasters will be televising their programs in digital and analog.

Even so, support for the timetable is significantly more likely to be found among men (36.3 percent versus 24.3 percent of women) and people with higher annual household incomes. For instance, 21.3 percent of individuals surveyed with incomes of less than \$35,000 say the government is allowing enough time, compared with 34.6 percent of people with incomes from \$35,000 to \$55,000 or 34.1 percent of those with incomes of \$55,000 or more.

A national random sample of 400 was drawn to complete the study, which produced results within a ± 5 percent margin of error. For more

information call 314-726-0746.

Convenience will drive adoption of on-line retail shopping

Will on-line shopping become a mainstream habit? According to a recent report from Forrester Research, Cambridge, Mass., once consumers discover the convenience of on-line shopping, spending will increase dramatically. By 2001, more than \$17 billion will be spent with on-line merchants.

On-line shoppers now spend more than \$4 million a day on PCs, software, books, music, and adult entertainment. But is this new activity ready to move from the experimental stage to an established behavior? Forrester's People & Technology Strategies Report "Retail Revs Up," examines the experiences of on-line shoppers and merchants and concludes that:

- Convenience will drive on-line retail's broader adoption. Consumers we interviewed say that on-line's convenience will increase purchasing frequency.

- Surgical shopping will remain the dominant pattern. Purposeful, focused buying rather than browsing will characterize this market.

- By 2001, today's leading consumer items (computers, software, entertainment, books, music, and travel) will set a blistering pace, accounting for 86 percent of on-line business. Apparel, food, and electronics will take hold later. For more information call 617-497-7090.

Major companies rely on intranets

In its report "Corporate Internet and Extranet Strategies: the Business Implications," New York-based technology analysis firm Datamonitor states that over half of the Fortune 500 intranets will function as extranets by the year 2000 and ROI should not be the primary driver for corporate intranet investment.

Intranets are rapidly becoming commonplace in U.S. corporations. According to Datamonitor, nine out of every 10 large businesses (i.e., \$500 million in annual revenues) will have an intranet before the end of this year.

"By the year 2000, more than half of corporate intranets will be opened up into extranets, enabling companies to easily share information with their business partners thus leading to increased investment and content development for internal Web sites," says Datamonitor Analyst Robert Shavell.

IT managers say intranets pay for themselves within a six-month period, but companies should not use ROI alone to justify this investment. Datamonitor research indicates that most businesses anticipate a return on investment very quickly.

"Simply put, initial costs for a bare-bones intranet are very low. As more functions are offloaded to the intranet, costs rise significantly. But intranets are a new kind of animal, they hide their costs by blending in like well-adapted chameleons. Corporations need to get realistic about their intranet initiatives and stop using ROI hype to sell these projects to senior management," says Shavell. For more information call 212-686-7400.



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Product & Service Update

continued from p. 8

file conjoint analysis software tool. Conjoint analysis is a technique which identifies trade-offs customers will make between features, brands and prices. The product is designed to help users test concepts in product development, set prices, target specific market segments and benchmark products against the competition. Its on-line surveys, called WebCards, gather customer preferences on the Internet. In addition, the product analyzes results from pencil-and-paper studies and one-on-one computer-aided personal interviews (CAPI). For more information call 760-804-8555 or visit the company's Web site at <http://www.qpr-tools.com>.

IRI brand database now available on-line

Information Resources, Inc. (IRI), Chicago, is offering its InfoScan Reviews database via a new service called ReviewNet. The service provides users with access to marketing data on more than 5,000 brands. The InfoScan Reviews database contains detail on sales, market shares and pricing of thousands of consumer packaged goods brands. ReviewNet, located in the password protected portion of IRI's Web site, provides users with more than five years of data on manufacturers and their brands which are sold in food and drug stores and four years of data for mass merchandise stores. For more information call 312-726-1221 or visit the company's Web site at <http://www.infores.com>.

Pulse Train upgrades CATI system, Pulsar

Pulse Train Technology has released Bellview CATI version 6.10, an upgrade of its telephone interviewing system which includes improvements designed to boost interviewing productivity and provide greater control over survey and sample management. Changes can

now be made to a questionnaire once interviewing is in progress, without setting up a new survey. The supervisor now has the option to view any survey information, such as the status of sample records or quotas, using a filter. Any question contained in the survey script can be used to

filter information in this way. Filters can also be applied when activating or deactivating specific records for interviewing, when outputting data records and when copying or removing interview records from a survey. The company has also released Pulsar 2.1, an update of its interac-

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tive data analysis package. The new release includes a data streaming editor, which allows the user to combine a number of different surveys for analysis as one survey. Data which is available for the same variable in different survey waves is automatically combined. Where there are differences between the structure of variables in separate survey waves, the user can edit the variables in the data streaming editor to prepare them for combined analysis. For more information call Hank Copeland at 561-842-4000 or visit the company's Web

site at <http://www.ws.pipex.com/ptt>.

Cardiff Software updates TELEform

Cardiff Software, Inc., San Marcos, Calif., has upgraded its TELEform products. TELEform Standard and TELEform Elite Version 5.4 include new and enhanced features such as electronic forms imaging, high-speed form merge, dynamic preprocessing, improved zone image formatting, enhanced form identification and

improved recognition technology. For more information call 800-659-8755 or visit the company's Web site at <http://www.cardiffsw.com>.

New information products from IntelliQuest

IntelliQuest Marketing Information Solutions has introduced Information, Enhance, and Insight, the first three product lines in its Intelligent Customer Information System (IntelliCIS) product family. The first product line is designed to help clients better identify and understand their customers. It is comprised of external data such as demographic, lifestyle and public record data. Enhance appends specific demographic and lifestyle information to customer data and provides data cleansing and processing services. Insight includes consulting and training in database marketing best practices implementation and the MKIS User Forum, an organization designed to enhance the professional development of attendees through the exchange of ideas and experience in the implementation of database marketing solutions. For more information call 770-612-8008 or visit the company's Web site at <http://www.intelliquest.com>.

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Conduct on-line surveys without software

NetReflector LLC, a Redmond, Wash.-based subsidiary of Feedback International, has launched InstantSurvey, an on-line business application for designing and conducting surveys. Survey recipients are invited to participate in a survey through a personalized E-mail or linking from a client Web site. There is no software to purchase or download. Using their Web browser, clients log onto InstantSurvey as needed through a Windows NT-powered Web site maintained by

NetReflector. Users can write a questionnaire from scratch, import questions from a word processing document or customize an InstantSurvey pre-written template. NetReflector offers a free trial for all visitors to its Web site, allowing them to create, distribute and report on a survey of up to 25 people. InstantSurvey is compatible with Internet Explorer 3.0 and above and Netscape Navigator 3.02 and above. For more information visit the company's Web site at <http://www.instantsurvey.com>.

Web. Searches can be built using multiple criteria, such as company name, industry category, etc., or through an Express Search feature that allows users to find reports on a single topic. From a fully-indexed citation list, users can choose to read free tables of contents or select full-image reports to view in portable document format (PDF), most with the original formatting, charts and graphs. For more information call 800-662-7878 or visit the company's Web site at <http://www.investext.com>.

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Decisive Technology, Mountain View, Calif., is offering Decision-Source, client/server enterprise survey software that allows corporations to obtain instant customer feedback using the Internet. Built-in analysis tools help to generate graphs and tables that can be exported to other applications or posted directly to the Web. The product includes a list of sample survey questions, including customer satisfaction, demographics, customer support and Web site effectiveness. Questions range from multiple choice to open-ended text questions. For more information call 800-987-9995 or visit the company's Web site at <http://www.decisive.com>.

Brokerage reports, market data on-line

The Investext Group has released Research Bank Web Version 1.0, a new Internet product that delivers full-text and original-line image brokerage reports and market analysis to individual desktops. Users can view and print from a collection of investment research, market analysis and trade association data over the Internet. Over 5,000 new reports are added to the collection each week. More than 450 investment banks, 60 market research firms, and 150 trade associations worldwide author the reports available on Research Bank

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Predictive dialers

continued from p. 16

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A primer on predictive dialers

Without predictive dialing, when an interviewer is ready for the next call, they dial the telephone number — either manually or with an autodialer. Many of these calls do not result in a live person answering the phone but are a busy, no-answer, disconnected, out of service, changed number or an answering machine. It is not unusual for an interviewer to spend the majority of their time dialing just to find a live person. And remember, a live person does not translate into a complete. It is just the first step — there is cooperation, callbacks and, of course, incidence to consider.

When using predictive dialing, interviewers do not dial the telephone — it is done behind the scenes. The CATI system “feeds” telephone numbers to the dialer. The predictive dialer knows how many interviewers are waiting for a call and what percentage of the recent dialings were live people. Based on these factors, it dials more than one telephone number for each available interviewer — the goal being that when interviewers are finished with a respondent, they will wait no more than 10-15 seconds before they are connected to a live person. When the call is finished, the CATI system informs the dialer that the interviewer is available for another call. The interviewer

just waits until they hear the respondent say hello.

Myths — some true, some not true

Myth #1: The calls will come so fast that the interviewers won't be able to keep up with the telephone calls. Also known as the “Lucy in the Candy Factory” syndrome.

FALSE. There is a perception that the interviewers will be so overwhelmed by the number of calls that they won't even have enough time between calls to catch their breath. Ask any interviewer who has worked on both a manual and a predictive system and just about 100 percent will say they prefer the predictive system. The reasons are because with manual dialing they have to (and with predictive dialing they DON'T have to):

- dial the telephone hundreds of times a shift;
- listen to fax and modems screeching in their ear;
- listen for 30 boring seconds, which is what three rings take, before they can dispose of the call as a no-answer;
- listen to the endless telephone company tri-tone messages, which are those three tones followed by a message informing you that the number you called is out of service or disconnected or changed; (If you want an accurate call report, the interviewer has to listen to the tones and the recorded message before they can dispose of the call.)

In predictive mode, when a call has ended, the interviewer does nothing but wait until they are connected to

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the next live person. The amount of time they wait depends on many factors, but the range is between 10 and 15 seconds. If the interviewer wants to take a break, unlike Lucille Ball on the assembly line in the candy factory, all they need to do is hit one key on their computer keyboard and the dialer will stop connecting calls to their station.

Myth #2: They are very expensive.

TRUE. Depending on the dialer company and the number of stations, the cost is between \$3,000 and \$5,000 per interviewing station. This is in addition to the cost of the CATI system. Another cost is the additional telephone trunks. Unlike manual dialing where you need one telephone trunk for each interviewing station, predictive dialing requires more trunks — usually two for each interviewing station.

Myth #3: When a respondent answers the phone, it will take so long for an interviewer to be connected that the respondent will hang up.

Sometimes TRUE, sometimes FALSE. It's 9 a.m. Saturday morning and your telephone rings at home. You pick up the phone but there is no one there. But, you know someone is there because you didn't hear a hang-up click. Finally, a few seconds later, a voice says "Hello, may I speak with . . . ?"

Could a predictive dialer be responsible for this annoying silence? Yes, guilty — but with an explanation.

A good predictive dialer will transfer a live person to an available interviewer in about 1/20th of a second — the effect being that the respondent will hear no silence and the interviewer will hear enough of the respondent's hello to know if they have reached a male, female, boy or girl. In the world of "you get what you pay for," some dialers just don't transfer as fast and that is part of the reason for the delay. The other reason for a delay happens when a not-so-good predictive dialer tries to detect answering machines. The only way for a dialer to detect an answering machine is by the cadence of what the person answering the phone says.

Think about it: When you answer your phone at home, you say hello and then you wait for a response. But your answering machine probably says something like "Hi, you've reached us but we're not home, yadda yadda yadda." The predictive dialer knows the call is either a live person or an answering machine, but which is it? The only way for the dialer to determine is for it to hold off transferring the call to an interviewer and continue listening for the cadence of what is said until it can determine whether it is a live person or an answering machine. After hello and nothing more, the dialer has enough information to know it is a live person and then begin the process of determining which interviewers are available and then transferring the call. A not-so-good predictive dialer which is also trying to detect answering machines is the cause of the many seconds of silence.

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Myth #4: Predictive dialers don't make business sense because they are only effective if the calls are very short. And most market research projects are 15 minutes or longer.

FALSE. In our industry, we refer to the length of the study as the number of minutes that one completed interview takes. However for each completed interview, there are many calls that don't result in a complete — and these calls are very short. In fact, it is not uncommon for 90 percent of the total calls dialed to be one minute or less. Consider the mythical 100 percent incidence project using RDD sample. For each complete, about six pieces of sample will be needed. At 50 percent incidence, about 12 pieces of sample will be needed. At 25 percent, 24 pieces of sample will be needed. At 10 percent, 60 pieces of sample will be needed. You get the idea.

Using 50 percent incidence as an example, of the 12 pieces of sample, about seven will be busy, no-answer, answering machine or out of service. Of the approximately five live human beings that answer the phone, three of them will refuse or tell the interviewer to call back at a more convenient time and two of them will cooperate and complete the screener. At 50 percent incidence, one will terminate and one will qualify and hopefully complete the 15-minute questionnaire.

Score: 12 calls, 11 short, 1 long.

This example does not reflect what happens as you make multiple attempts on the same piece of sample because of a busy, no-answer, answering machine or call-back to try to find the right person in the household at

home. Answering machines and no-answers on the first attempt tend to be answering machines and no-answers on subsequent attempts which makes for even a larger percentage of short calls. One big advantage of predictive dialers and one that is rarely mentioned (for reasons that I don't understand) is that you can better penetrate the sample without an increase in interviewing hours.

Myth #5: Predictive dialers change the results of the study.

FALSE. The key word is change. I have never heard anyone say that they produce incorrect results. Predictive dialers do not change the sample that is dialed. They help to dial it faster and, when used properly, allow for multiple attempts without a major increase in interviewing hours. So if it can penetrate the sample better, any change in results are attributable to the fact that the predictive dialer is helping to find the hard-to-reach respondent. Not such a terrible thing, but that's only my opinion.

This statement about changed results reminds me of stories we have all heard about a study that has been done year after year after year. The client says that the company that has been doing the interviewing has done a terrible job — poor interviewing, always late, interviews don't validate as well as they should, inconsistent data, etc. And, although they would like to change the interviewing company, they are afraid to because, you guessed it, it might change the results.

Myth #6: Since they dial more numbers than there are interviewers available, there will be times when a respondent answers the phone and there is no interviewer available.

TRUE. This is true and it is called an abandoned call. When this happens the dialer hangs up and the respondent will hear dead air when they answer the phone and nothing more. A good dialer keeps statistics on how many numbers have been needed for one live person in the past few minutes and dials accordingly. By doing this, the abandon rate can be as low as 2 percent of the dialings.

Love those dialers

I admit it: I love predictive dialers. Just like the traditional type of love, the reasons for being in love change as we mature.

As a software developer of a CATI system, I loved being at the leading edge of the emerging area of telephony integration. Watching our CATI software and the predictive dialer working together at our first few client sites was a thrill.

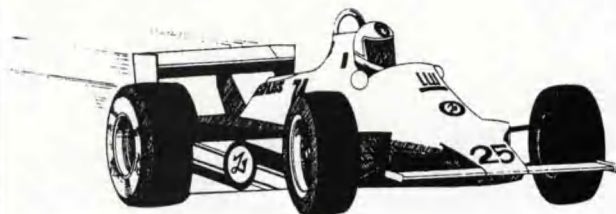
As we moved into the marketing of the CATI and predictive dialer combination, I loved the fact that the sale of the predictive dialer doubled or in some cases tripled the price that a client paid us.

Now, as a telephone interviewing center, I love the fact that the production gains we get from using predictive dialing allow us to offer high quality interviewing at competitive prices. □

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Digital audio

continued from p. 18

two or more projects simultaneously requires either very limited use of voice-capture or a RAID storage system which interconnects several large hard disks to one network server.

As very large hard drives and RAID systems have only recently become available (and affordable), over the years we have been able to devise a number of strategies to limit system demands. First, we've been able to determine which voice-capture questions are most effective and which ones aren't; voice-capture should only be used on questions where listening to the recorded answers will be most productive for both the analyst and the client. Second, it's not always necessary to ask every voice-capture question of each individual respondent; in many cases, it's much more effective to limit follow-up probes to only those respondents providing specific answers to certain questions.

That's why we frequently program our questionnaires to skip past voice-capture questions unless very specific conditions are met. For instance, many of our surveys focus on viewer reaction to local television newscasts (and the people who present them). If we (and our clients) want to determine what viewers like best about the local newscasts on a given station, we would ask this question only among those who've actually watched that station within the past week. If it's been a month or more since they last watched that station for news, their answers may be driven by very old perceptions. Granted, there may be some value in exploring these older perceptions, but our experience has shown that value to be quite limited.

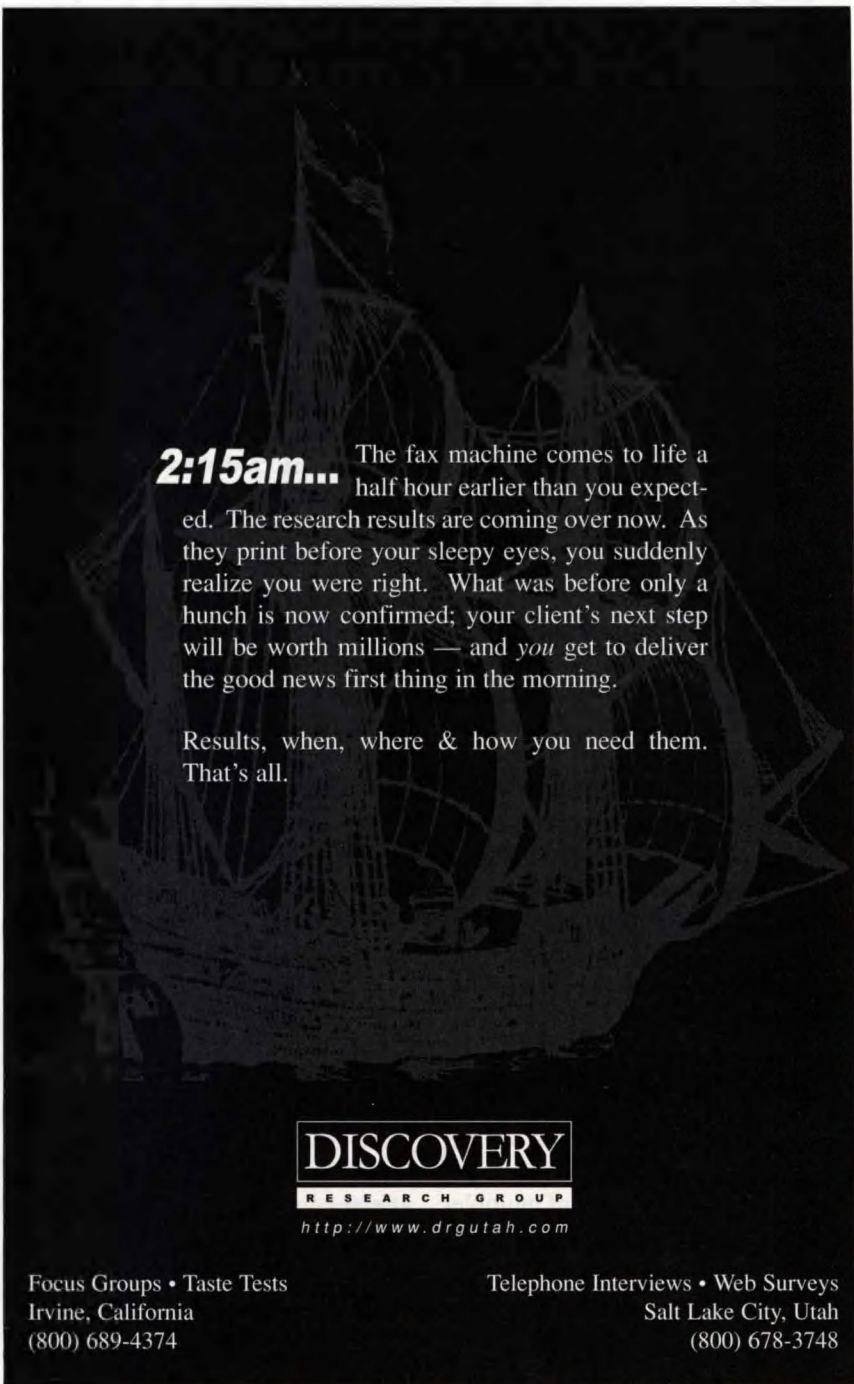
Most of our surveys also ask viewers to rate upwards of 20 of the people who present their local news, weather, and sports. For most personalities, the bulk of the reaction is either neutral or only mildly positive; very few generate a significant number of strong positives or negatives. We've historically found little value in using voice-capture to probe these middle responses, so we only ask voice-capture when a respondent feels strongly about a

given personality, one way or the other.

By listening only to those with a strong positive response, our clients are able to develop a marketing campaign that emphasizes the qualities viewers really like. At the same time, they use the negatives to help coach that person's on-air performance. We also usually limit voice-capture probes to only those personalities employed by our client station. It might be interesting to know why viewers like (or dislike) someone on a competing station, but there's ulti-

mately very little our client can do with that information.

Finally, in developing the initial specifications for the voice-capture software, we asked the development team at Creative Research (the Petaluma, Calif.-based makers of The Survey System, the interviewing software we use) to give interviewers the option of automatically erasing a specific response without saving it to the hard disk. With or without voice-capture, the answer to many open-ended questions is frequently nonresponsive, answers which (because of voice-cap-



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ture) would waste valuable hard disk space. With The Survey System, once a question has been asked and answered (and probed for clarification as needed), on-screen instructions force the interviewer to decide whether or not the answer is worth keeping.

Together with the other techniques already addressed, this allows us to ask upwards of 20 voice-capture questions per survey, yielding approximately 15 full hours of recorded audio (which requires just under 600MB of disk storage).

Perfecting the art of the interview

Beyond the logistics of data storage, voice-capture can significantly impact on the quality of interviews. Clients will have a chance to hear every interview conducted for their survey, good and bad.

For a research firm, it's one thing to spot-check the quality of an telephone interviewing staff; it's quite another to have the opportunity to listen to each and every one of their interviews. Voice-capture gives research firms a golden opportunity to train their interviewing staffs. Since all of their interviews are recorded, company supervisors can monitor all of their work and sit down with them after each project to review and ultimately improve their performance.

Listening to respondent comments has convinced us that conversational interviewing makes the respondents much more likely to share their opinions, offering answers which are much more articulate and detailed.

Voice-capture has also prompted us to change not only the language we use within a questionnaire (to make it more conversational as well), but also the overall structure of the questionnaire itself. Being able to actually listen to respondents talk has caused us to rely more and more on open-ended questions, to the point where they now account for up to half of our voice-capture surveys. Of course, we still make very heavy use of multiple-choice questions as well, but increasingly these questions are designed and used as setups for the verbatim. In many cases, voice-capture has even prompted us to change the language

we use in the multiple-choice setups.

Case in point: Prior to the use of voice-capture, we used to ask respondents to rate television personalities using a 10-point scale. At the time, the choice seemed logical; thanks to the Olympics, the use of a 10-point scale to rate an individual had become part of the vernacular. Using then-standard data collection techniques, we would first ask respondents to rate each personality on the 10-point scale, then ask them to explain why they rated that person that way.

Transcribed and then printed out on paper, these "personality" verbatims appeared to be just fine: they looked more or less like every other verbatim report we had ever seen. However, once we started using voice-capture, we started to realize just how badly we (and our clients) were misinterpreting these respondent comments. Much of the meaning is conveyed in how people say things, and that's something which is impossible to transcribe (in fact, after hearing voice-capture for the first time, most clients realize that they've been misinterpreting verbatim printouts, putting their own spin on respondent comments).

We also found that the 10-point scale wasn't quite as effective as we'd once thought in setting up the open-end probes. The verbatims may have looked fine on paper, but in listening to them we felt there was something missing. Our television station clients want to know two things from the personality comments: how to best market this person to the audience, and how to best coach this person to improve his or her on-air performance.

By restructuring the setup question, we now get verbatims that are much richer and more actionable for the client. Instead of the 10-point scale, we now ask viewers to categorize personalities into one of three groups: those they like to watch, those they don't like, and those they aren't affected by either way. In retrospect, this may seem to be a more obvious choice for such an evaluation, but we might have never come to this realization without voice-capture. This revelation caused us to rethink every other

measure used in our basic boilerplate, even those which do not set up an open-end.

Overcoming the obstacles of data delivery and analysis

Even after we made the switch to voice-capture, at first we continued to code and analyze open-ends the way we always did, hiring a coder to categorize the general subject(s) touched on within each comment. Of course, in the absence of a printed transcription it was initially deemed too time-consuming for a top-level analyst to listen to all of the verbatims, so we eventually had the coders prepare brief write-ups summarizing and excerpting the responses to each verbatim question. It wasn't long before we realized how much we were losing by not conducting a more thorough analysis.

At the same time, we were just beginning to make our first voice-capture presentations to our clients. Using the same software we used for data processing, we took time during the presentation to enter all of the individual parameters for each specific question to be played back for everyone to hear. Of course, since we used this same software every day, it only took us a matter of moments to call up the answers to a specific question; however, clients had difficulty accessing the comments in the weeks following the presentation. We also found that during our presentations, after hearing the first few comments made in response to each question, the clients soon tired of listening to rest of the comments. It was obvious that they would never take the time to review all 15 hours of recorded audio.

The solution to both problems turned out to be a very expensive proposition: the software would have to be revised specifically for client use, and we would have to dedicate a top-level analyst to the job of verbatim analysis. In addition to coding, this person would write up a much more in-depth analysis, at the same time choosing what would amount to an executive summary of the most articulate and representative comments. This written analysis could then be incorporated into the final

report, and the clients would still be able to hear a selected sampling of what their customers had to say. Unfortunately, it takes even an experienced analyst about four hours to analyze one hour's worth of comments: going this route meant we'd have to add 60 hours of high-level analysis to each voice-capture project (on top of the software revision costs).

Along the way, we also had the developers add new features to the software package, the most significant of which lists certain respondent characteristics on-screen while each comment was being played. This gives us (and the client) a chance to "see" who's talking. With the new software interface (which allows the analyst to pre-program these respondent characteristics to be identified during playback), it's no longer necessary for either the presenter or the client to manually enter these specifications each time he or she wishes to hear a verbatim. All of the comments (and the software required to access them) can now be transferred onto an inexpensive multimedia CD-ROM. Now, it's a matter of simply loading the software, then using Windows' point-and-click technology to trigger playback of the verbatim you wish to hear.

Getting the presenter out of the way

Perhaps it's a phenomenon unique to our work in television, but it's not uncommon for us to be delivering a project to a client who really hasn't bought into the research process. Management/production executives may have ordered the study because they want to improve their ratings, but the producer/creative types don't always want to hear what we researchers have to say. Maybe it's a matter of the "right-brainers" feeling uncomfortable with what is essentially a "left-brain" exercise; perhaps they don't fully comprehend the statistical validity of the process. They may even feel that, as researchers, we can't truly empathize with the creative and artistic pressures involved in putting a program on TV. Whatever the reason, as far as they're concerned, we might as well be wearing lab coats when we show up.

Once again, voice-capture provides the solution: It helps get the researcher out of the way of the data, giving the producer/creative types a chance to hear directly from their

eliminates this problem by providing a proportionate, random sampling of the audience as a whole.

Clients get to hear directly from their "customers" without worrying

The legal and ethical issues surrounding the use of voice-capture

Intrastate calling falls under the direct jurisdiction of individual state regulatory authorities, which vary from state to state. However, calls made across state lines are regulated by the Federal Communications Commission (FCC). An FCC attorney has advised our company that since only one party to an interstate call must grant permission to record the conversation, the interviewing firm can be the granting party. It is not necessary for us to ask the respondents' permission to record (readers are advised to obtain their own legal counsel on this matter). However, as an ethical consideration we routinely ask all of its respondents if they are willing to permit the use of a computer "to digitally record your answers to certain questions, just to make sure we get down exactly what you have to say." Since we first launched the use of voice-capture five years ago, the cooperation rate which is consistently in excess of 90 percent.

audience. Some might argue that they've always had that opportunity with focus groups, but many such clients almost invariably leave a focus group a) hearing only what they wanted to hear, and/or b) wondering just how representative group comments really are. Voice-capture

that the researcher might be putting his or her own interpretation on the data. It's remarkable to witness firsthand just how quickly the walls begin to break down with voice-capture, when previously difficult clients open up to what the audience has to say. □



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ARAMARK

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Each of ARAMARK's eight different regions is allowed to include optional questions on menu items and features which may be unique to their area. For example, one region might ask about its gourmet coffees or how well it meets special dietary needs.

Two weeks after receiving the completed surveys, NCS sends each ARAMARK location a quick-response report summarizing the results. Three weeks later each location gets a Performance Improvement Planner Report. "We ensure that what comes in the door goes out the door and goes out the door in a timely manner," Kostner says. "We bar code the header and the pre-printed return label. When the materials arrive back, we scan that bar code so we know whose materials they are and we can track the materials internally."

ARAMARK managers receive separate reports on the employee results and the customer survey results. Once the results are available they meet with the client facility managers to go over the results. "At the unit level, the findings become documents for the food committee. So they can say, 'Here are things we have found out and here is the plan we need to put into action to drive

them,'" Roberts says.

Anonymous feedback

With the exception of some specific job environment-related questions, the ARAMARK employees answer the same questions on their survey as do the customers. "Employees are asked work life questions so that we get anonymous feedback about their supervisors, co-workers, the condition of the equipment they use, their feelings about their opportunities for advancement, etc.," Roberts says.

"It's a very good tool for us. NCS compares how our employees rate the food service along with our customers so that if there are any huge gaps, that's obviously something that we have to work on. It gives us the chance to say to the employee, for example, 'You think the food's a whole lot better than your customers do. What can we do about that?'"

Excellent source document

As empirical data from a third party, the survey findings serve ARAMARK in a number of ways beyond research. When talking with management at the facilities where ARAMARK provides dining services, the survey results show how that company's employees feel about the dining environment. "It's an excellent source document in client discussions," Roberts says. "We can say to them, 'Your employees have said they would like more seating area, or, 'They'd like us to open a half-hour earlier.'"

And it helps ARAMARK in prospecting for new business. "It shows prospective clients that we've had a customer satisfaction program in place before it was fashionable and that we use it at the unit level to drive customer satisfaction. You really have to have a measure of performance for your day-to-day end-user. We use it extensively in demonstrating to prospective clients that we can do what we say. In other words, we say we're the best but here are some examples of customers saying we're the best." □



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Effective interviews

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client wants to receive. For example, if the goal is to identify key satisfaction drivers, a questionnaire of all yes-and-no questions will not model well. If the program's goal is analysis, there should be more rating questions on specific parameters. Questionnaires are often a combination of general and specific questions. In customer satisfaction programs, we ask about overall satisfaction ratings but also break down satisfaction into more specific rating questions on individual behaviors. For example, in measuring satisfaction of customer service, the interview might include questions on how long it took to reach a representative, the courtesy and knowledge of the representative, as well as an overall satisfaction rating.

There should be a balance between open-ended and closed-ended questions. This varies with program goals and what the client wants the interaction to look like. Some clients strive for an interview that presents warmth, appreciation and good feelings with the customer. Since approaching the customer tactfully is a primary objective in these interactions, they will involve more yes-and-no questions which are easier and less time-consuming for the customer to answer. Other clients want a more straightforward interview. Questions with ratings lend themselves more to a straightforward, businesslike format. Every program is unique, but most programs call for a mix of yes/no and rating questions with at least one open-ended question at the end, usually to ask what could be improved.

Testing the script

Once an interview is scripted, it is tested and revised. We test scenarios, script length and the effectiveness of individual questions. If a question consistently generates scores of 98 and 99, it probably will not produce results that are useful or actionable. One of our primary goals is to design questions that will help the client

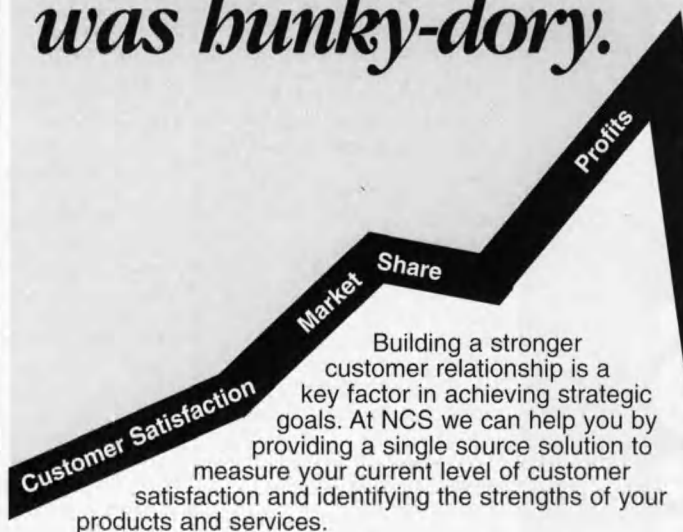
improve performance and increase customer satisfaction and retention. We pre-test the script by conducting a small number of interviews, maybe 25, with live customer respondents. A project director usually monitors these calls to evaluate whether the questions are understandable, whether the length is right and whether it flows smoothly.

Timely revisions

After the interview has been pre-tested and any kinks ironed out, it should be used consistently through-

out the program, so as not to skew results. Questionnaires are sometimes revised over the course of a program, but never within a reporting period. Sometimes, in the course of speaking with customers, we learn about new satisfaction drivers the client may want to measure. In this way, the interview and overall program can evolve in response to new information. Nevertheless, one should make every effort to design the best possible interview in the first place so program results provide a good basis for benchmarking over time. □

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Fader & Associates
First Market Research Corp. (Heiman)
John Fox Marketing Consulting
Marketing Advantage Rsch. Cnslts.
Jay L. Roth & Associates, Inc.
Paul Schneller - Qualitative
Strategy Research Corporation

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Burr Research/Reinvention
Prevention
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Cambridge Associates, Ltd.
Cambridge Research, Inc.
The Deutsch Consultancy
Dolobowsky Qual. Svcs., Inc.
Erick and Lavidge
The Eisenmann Group
Fader & Associates
First Market Research Corp. (Reynolds)

Lieberman Research Worldwide
Low + Associates, Inc.
Marketing Matrix, Inc.
Matrixx Marketing-Research Div.
MCC Qualitative Consulting
Jay L. Roth & Associates, Inc.
James Spanier Associates
Widener-Burrows & Associates, Inc.

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C&R Research Services, Inc.
CJRobbins
Greenleaf Associates, Inc.
Holleran Consulting
Just The Facts, Inc.
Leichter Assoc. Mktg. Rsch./Idea Dev.
Macro International
The New Marketing Network
Outsmart Marketing
Perception Research Services, Inc.
Jay L. Roth & Associates, Inc.
Paul Schneller - Qualitative

FOOTWEAR

Best Practices Research

HEALTH & BEAUTY PRODUCTS

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Paul Schneller - Qualitative
Thorne Creative Research

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Colburn & Associates
Directions Data Research
Dolobowsky Qual. Svcs., Inc.
The Dominion Group Mktg. Rsch.
D/R/S HealthCare Consultants
Erick and Lavidge
Erich Transcultural Consultants
The Eisenmann Group
First Market Research Corp. (Reynolds)
Holleran Consulting
Irvine Consulting, Inc.
Knowledge Systems & Research, Inc.
Lieberman Research Worldwide
Low + Associates, Inc.
Macro International
Market Navigation, Inc.
Matrixx Marketing-Research Div.
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Research Options, Inc.
Spiller Research Group, Inc.
Strategy Research Corporation
V & L Research and Cnsltg., Inc.
Widener-Burrows & Associates, Inc.
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HISPANIC

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Erich Transcultural Consultants
Hispanic Marketing
Communication Research
In Focus Consulting
Lieberman Research Worldwide

Mari Hispanic Field Services
The Market Connections Group
Market Development, Inc.
Francesca Moscatelli
Strategy Research Corporation
Target Market Research Group, Inc.

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Research Connections, Inc.
Perception Research Services, Inc.
Thorne Creative Research

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Paul Schneller - Qualitative

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C&R Research Services, Inc.
Cambridge Associates, Ltd.
Creative Focus, Inc.
Dolobowsky Qual. Svcs., Inc.
Doyle Research Associates
Erick and Lavidge
John Fox Marketing Consulting
Just The Facts, Inc.
Leichter Assoc. Mktg. Rsch./Idea Dev.
Matrixx Marketing-Research Div.
Paul Schneller - Qualitative

IMAGE STUDIES

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Holleran Consulting

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Market Navigation, Inc.

INSURANCE

Burr Research/Reinvention
Prevention
Erich Transcultural Consultants
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INTERACTIVE PROD./SERVICES/RETAILING

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Research Connections, Inc.

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Knowledge Systems & Research, Inc.
Research Connections, Inc.

INTERNET SITE DEV.

Perception Research Services, Inc.

INVESTMENTS

The Deutsch Consultancy

LATIN AMERICA

Best Practices Research
Market Development, Inc.

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Best Practices Research
Holleran Consulting

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Cambridge Associates, Ltd.
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QS&A Research & Strategy
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MODERATOR TRAINING

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Macro International

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CJRobbins
Daniel Associates
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Elrick and Lavidge
Fader & Associates
First Market Research Corp.
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Greenleaf Associates, Inc.
Just The Facts, Inc.
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Irvine Consulting, Inc.
Macro International
Market Navigation, Inc.
MCC Qualitative Consulting
MedProbe™, Inc.
QS&A Research & Strategy
Paul Schneller - Qualitative
Spiller Research Group, Inc.
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Francesca Moscatelli

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JRH Marketing Services, Inc.

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Greenleaf Associates, Inc.
Lieberman Research Worldwide
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Knowledge Systems & Research,
Inc./Leichliter Assoc. Mktg.
Rsch./Idea Dev.
Lieberman Research Worldwide
MCC Qualitative Consulting

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Creative Focus, Inc.
Fader & Associates

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sultants

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Grieco Research Group, Inc.
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Thorne Creative Research

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Knowledge Systems & Research, Inc.
Linda Fitzpatrick Rsch. Svcs. Corp.
Horowitz Associates Inc.
Marketing Advantage Rsch. Cnslts.
MCC Qualitative Consulting
Jay L. Roth & Associates, Inc.
Strategy Research Corporation

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Cambridge Associates, Ltd.
Doyle Research Associates
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Best Practices Research

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QS&A Research & Strategy
Research Data Services, Inc.

TOYS/GAMES

Fader & Associates
Greenleaf Associates, Inc.

TRANSPORTATION SERVICES

Low + Associates, Inc.
Markinetics, Inc.
Strategic Focus, Inc.

TRAVEL

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Greenleaf Associates, Inc.
Research Data Services, Inc.
James Spanier Associates

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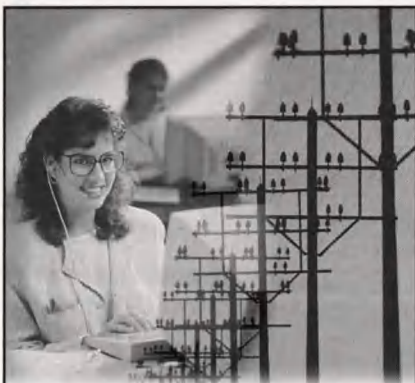
Interviewing



Directory

This directory was developed by mailing forms to firms we identified as having telephone interviewing facilities. In addition to each company's vital information, we've included a line of codes showing the number of interviewing stations, the number of stations which use computer-aided telephone interviewing (CATI), and the number of stations that can be monitored on-site and off-site.

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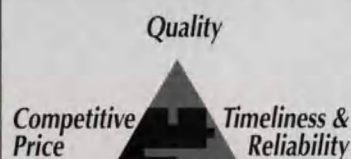


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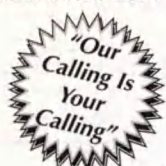
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3. ON-SITE - No. of stations which can be monitored on-site
4. OFF-PREMISES- No. of stations which can be monitored off-premises

Alabama

Birmingham

Connections, Inc.
3928 Montclair Rd., Ste. 230
Birmingham, AL 35213
Ph. 205-879-1255
Fax 205-868-4173
Rebecca V. Watson, President
25-0-25-0

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Brookwood Village Mall, #612A
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Birmingham, AL 35209
Ph. 205-879-0268 or 800-336-0159
Fax 205-879-1058
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<http://www.consumerpulse.com>
Sally Cherry, Director
8-4-8-8

New South Research
3000 Riverchase, Ste. 405
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Ph. 205-985-3344 or 800-289-7335
Fax 205-985-3346
E-mail: NSRJJ@aol.com
Amy June Wilhite, Managing Director
20-4-20-20

Polly Graham & Associates, Inc.
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Birmingham, AL 35244
Ph. 205-985-3099
Fax 205-985-3066
Cindy Eanes, Vice President
20-0-20-20

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Anchorage

Dittman Research Corp. of Alaska
DRC Building
8115 Jewel Lake
Anchorage, AK 99502
Ph. 907-243-3345
Fax 907-243-7172
E-mail: dittman@micronet.net
Terry O'Leary, Vice President
16-0-16-0

Arizona

Flagstaff

Social Research Laboratory
Northern Arizona University / Box 15301
Flagstaff, AZ 86011-5301
Ph. 520-523-1515
Fax 520-523-6777
E-mail: Fred.Solop@nau.edu
<http://www.nau.edu/~srl>
Fred Solop, Associate Director
12-12-12-0

Phoenix

The Analytical Group, Inc.
8687 E. Via de Ventura
Scottsdale, AZ 85258
Ph. 602-483-7505
Fax 602-922-0302
E-mail: lucy@acsinfo.com
<http://www.acsinfo.com>
Lucy Haydu
60-60-60-60
(See advertisement on p. 46)

Arizona Market Research
Div. of Ruth Nelson Research
10220 N. 31st. Ave., Ste. 122
Phoenix, AZ 85051-9562
Ph. 602-944-8001
Fax 602-944-0130
E-mail: rnmcmrs@aol.com
<http://www.ruthnelsonresearchsvcs.com>
Lincoln Anderson, Manager
20-0-20-0

Behavior Research Center
1101 N. First St.
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Ph. 602-258-4554
Fax 602-252-2729
E-mail: brc@primenet.com
<http://www.primenet.com/~brc/>
Earl de Berge, Research Director
27-27-27-27

Focus Market Research, Inc.
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Phoenix, AZ 85251
Ph. 602-874-2714
Fax 602-874-1714
E-mail: phoenix@focusmarketresearch.com
Ray Opstad, General Manager
12-0-12-0

Higginbotham Assoc., Inc. of Arizona
8010 E. McDowell Rd., Ste. 208
Scottsdale, AZ 85257
Ph. 602-946-7535
Fax 602-946-1170
Roger Bedessie, General Manager
80-80-80-80

O'Neil Associates, Inc.
412 E. Southern Ave.
Tempe, AZ 85282
Ph. 602-967-4441
Fax 602-967-6122
E-mail: USAPolls@aol.com
Michael J. O'Neil, Ph.D., President
14-14-14-0

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Fax 602-941-0949
E-mail: postmaster@qcs.com
<http://www.qcs.com>
Jo McCullough, Branch Manager
10-0-10-10
(See advertisement on p. 97)

Research Resources
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Phoenix, AZ 85021
Ph. 602-371-8800
Fax 602-735-3270
E-mail: rrgroup@researchresources.com
<http://www.researchresources.com>
Dennis Anspach, Exec. Vice President
300-300-300-300

Response Research
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Phoenix, AZ 85013-1150
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Fax 602-247-4477
Shelly Munoz, General Manager
25-12-25-25

Strictly Medical Market Research
2400 E. Arizona Biltmore Cir., Ste. 1100
Phoenix, AZ 85016
Ph. 602-224-7979
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Wendy Walker, Exec. Vice President
10-0-10-0

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Ph. 602-956-1001
Fax 602-224-7988
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Wendy Walker, Exec. Vice President
10-0-10-0

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Phoenix, AZ 85016
Ph. 602-707-0050 or 800-999-1200
Fax 602-707-0055
E-mail: askarizona@westgroupresearch.com
<http://www.westgroupresearch.com>
Beth Aguirre, Project Director
50-50-50-50
(See advertisement on p. 71)

Tucson

FMR Associates, Inc.
6045 E. Grant Rd.
Tucson, AZ 85712
Ph. 520-886-5548
Fax 520-886-0245
E-mail: FMRASSOC@aol.com
Sue Lunde, Field Director
55-40-55-55

PhoneSolutions, L.L.C.

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Tucson, AZ 85712
Ph. 520-296-1015
Fax 520-296-3393
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3. ON-SITE - No. of stations which can be monitored on-site
4. OFF-PREMISES - No. of stations which can be monitored off-premises

Arkansas

Fort Smith

C & C Market Research, Inc.
Central Mall
5111 Rogers Ave., #40-N
Fort Smith, AR 72903
Ph. 501-484-5637
Fax 501-484-7379
Craig Cunningham, President
19-8-19-19

Little Rock

Flake/Wilkerson Market Insights
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Fax 501-221-2554
E-mail: facts@mktinsights.com
http://www.mktinsights.com
George Wilkerson, COO
35-35-35-35

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Little Rock, AR 72201
Ph. 501-376-7755
Fax 501-372-1909
Nancy Meador, Mgr. of Mktg. Svcs.
100-100-100-100

California

Bakersfield

Marketing Works
425 18th St.
Bakersfield, CA 93301
Ph. 805-326-1012
Fax 805-326-0903
E-mail: ddnacnud@aol.com
Dee Simpson, Owner
19-3-2-0

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AIS Market Research
5707 N. Palm, Ste. 101
Fresno, CA 93704
Ph. 800-627-8334 or 209-252-2727
Fax 209-252-8343
E-mail: aisres@psnw.com
Jennifer Nichols, Manager
30-30-20-20

Bartels Research Corp.
145 Shaw Ave., Ste. C1 & C2
Clovis, CA 93612
Ph. 209-298-7557
Fax 209-298-5226
E-mail: bartels1@compuserve.com
Joellen Bartels, President
50-10-50-0

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Fax 209-226-9354
E-mail: fresno@nichols-research.com
http://www.nichols-research.com
Amy Shields
15-8-10-0

Los Angeles

(See also Orange County, CA)

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Ph. 818-905-1525
Fax 818-905-8936
Mark Tobias, Partner
25-0-25-0

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Los Alamitas, CA 90720-2821
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Fax 562-493-6335
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Dr. Anita Kantak, Principal
10-10-10-10

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Ed Goldbaum, Owner
20-0-20-0

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3760 Kilroy Airport Way, Ste. 100
Long Beach, CA 90806
Ph. 562-981-2700
Fax 562-981-2705
E-mail: AIMLA@aol.com
Peter Carmichael, Manager
14-0-0-0
(See advertisement on p. 107)

Assistance in Marketing/Los Angeles
949 S. Coast Dr., Ste. 525
Costa Mesa, CA 92626
Ph. 714-755-3900
Fax 714-755-3930
E-mail: AIMLA@aol.com
Cindi Reyes, Manager
23-0-0-0
(See advertisement on p. 107)

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Fax 818-780-0329
E-mail: kgross@calsurvey.com
Ken Gross, President
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http://www.consumerpulse.com
Angie Abell, Director
20-12-20-20

Creative Data
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Fax 818-988-4057
E-mail: creativedata@earthlink.net
http://www.interviewingservice.com
Jennifer von Schneidau, V.P./G.M.
22-0-14-0

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Ph. 818-591-2408
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Carol Davis, President
75-75-75-75
(See advertisement on p. 73)

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Eric Wheeler, Director of Corporate
40-0-40-40

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E-mail: fielddynam@aol.com
Tony Blass, President
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http://www.garciaresearch.com
Angelica Gaxiola
36-36-36-36

Ted Heiman & Associates
California Qualitative Center
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Woodland Hills, CA 91364
Ph. 800-283-2133 or 818-712-4920
Fax 818-887-2750
E-mail: tedheiman@msn.com
Ted Heiman, Owner
25-0-19-19

House of Marketing
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Pasadena, CA 91105
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Fax 626-793-9624
E-mail: HMRResearch@aol.com
Amy Siadak
82-82-82-82

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Michael Halberstam, President
200-185-200-200

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Alhambra, CA 91801
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Fax 818-782-1309
E-mail: mhalberstam@interviewingservice.com
http://www.interviewingservice.com
Michael Halberstam, President
60-60-60-60

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Fax 818-907-8242
Lisa Balelo or Wendy Feinberg, Partners
22-0-22-0

Marylander Marketing Research, Inc.
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E-mail: HMARYLAND@aol.com
Candace Rueda, Field Director
13-0-13-13

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Los Angeles, CA 90045
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Fax 310-410-0780
E-mail: mmrcajd@aol.com
Dona H. Browne, Exec. Director
15-0-15-0

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Reseda, CA 91335
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Fax 818-345-9265
E-mail: Kim@plogresearch.com
Greg Plog, Field Director
30-30-30-30

Quality Controlled Services
Los Angeles Survey Center
17100 Pioneer Blvd., Ste. 170
Artesia, CA 90701
Ph. 562-402-6640
Fax 562-924-8487
E-mail: postmaster@qcs.com
http://www.qcs.com
Debra Gamboa-Kosch, Branch Manager
105-105-105-105
(See advertisement on p. 97)

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Fax 310-316-4815
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http://www.qcs.com
Marty Mills, Branch Manager
15-0-15-0
(See advertisement on p. 97)

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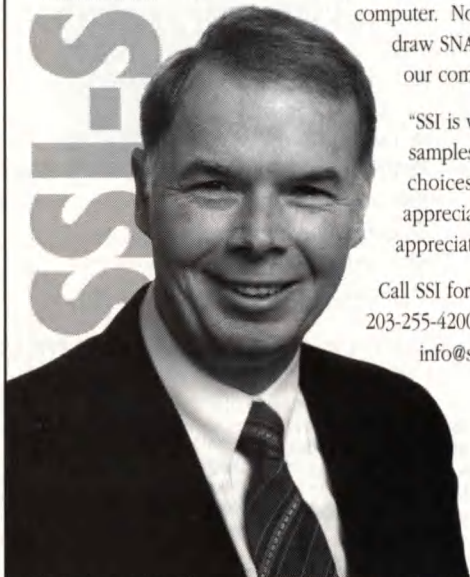
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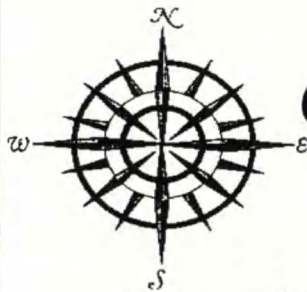
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Fax 630-916-0836
E-mail: ava@dimensionresearch.com
<http://www.dimensionresearch.com>
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Donna Barnes
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Fax 847-870-6236
E-mail: marrandhurst@att.net.com
Debbie Ottenfeld
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Lori Tomoleoni
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Candice Wysock, Branch Manager
10-0-10-0

(See advertisement on p. 97)

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Fax 708-479-4038
Marge Weber, President
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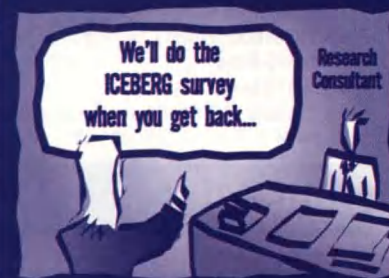
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6-0-6-0

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Janet Jackson, President
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Shannon Myers, Director of Operations
6-6-6-0

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20-0-20-0
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(See advertisement on p. 107)

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Fax 410-922-6675
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Tamara Zwingelberg, President
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Elizabeth S. Beirne, Director
20-0-20-20
(See advertisement on p. 91)

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Margi Priddy, Project Director
50-20-50-20
(See advertisement on p. 48)

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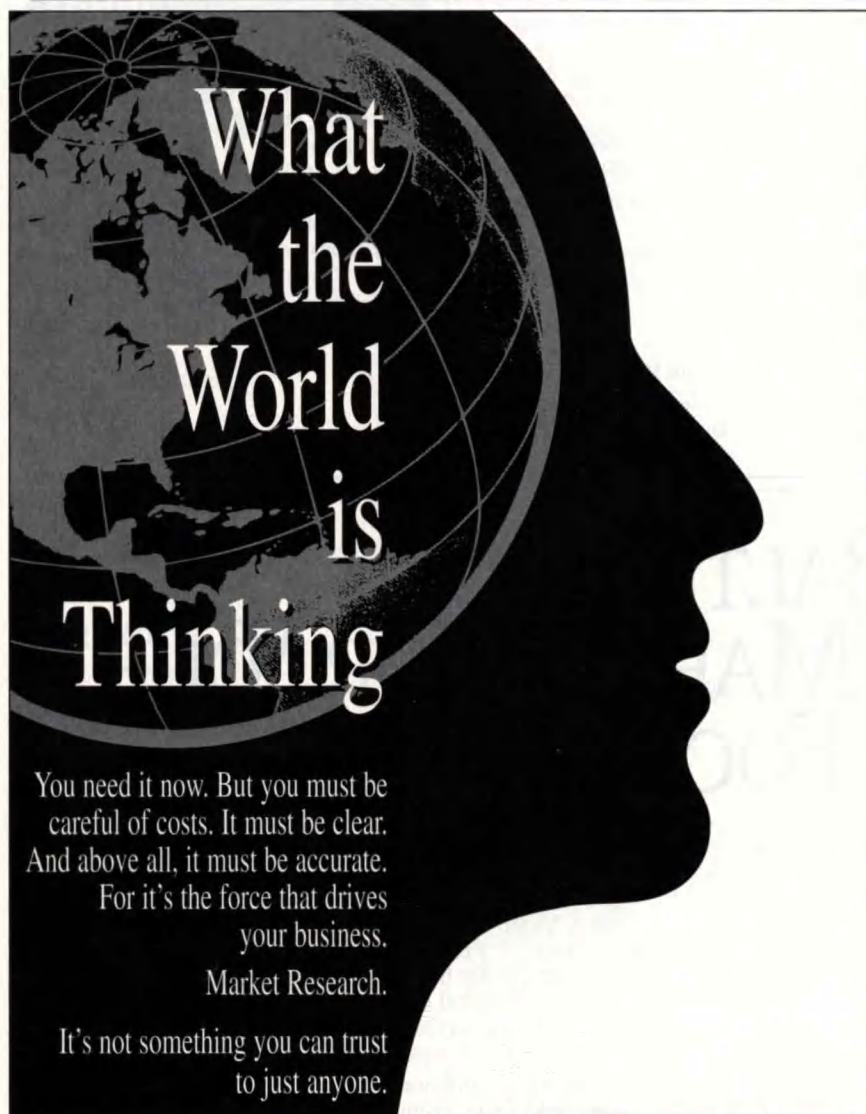
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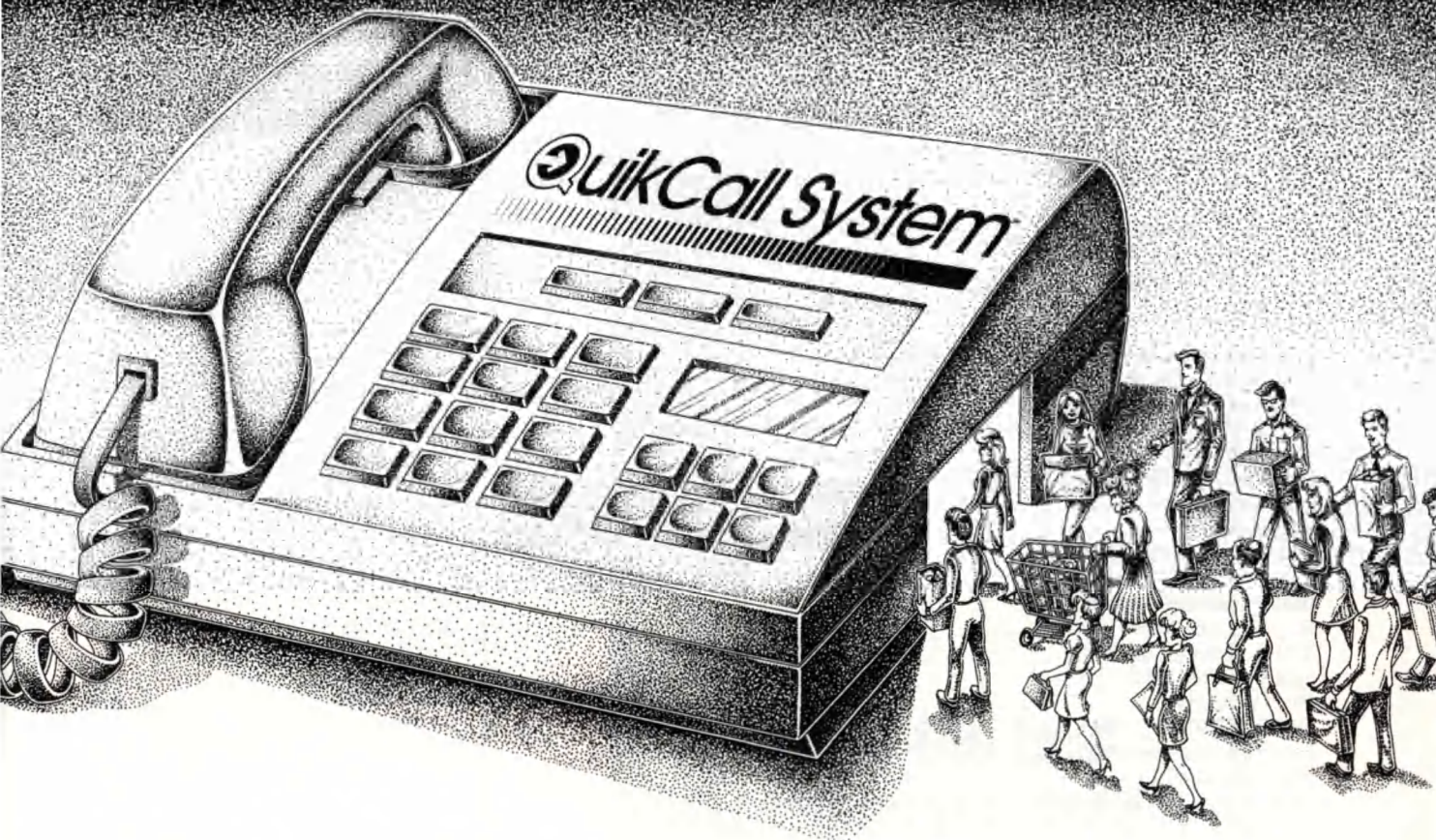
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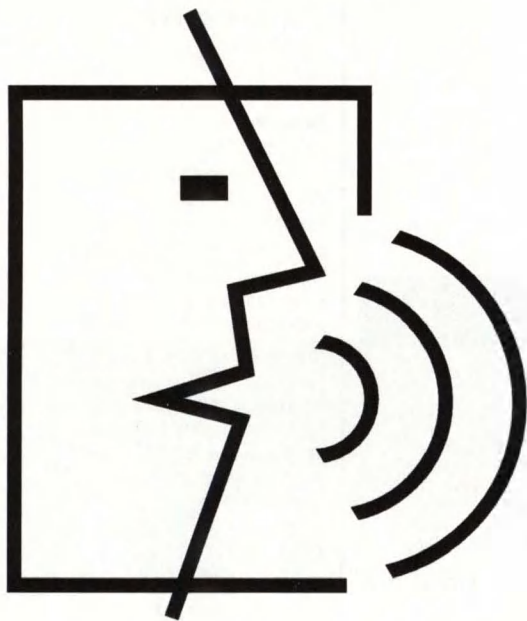
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48-48-48-48

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Ph. 606-344-0077
Fax 606-344-0078
E-mail: clint@allianceresearch.com
<http://www.allianceresearch.com>
Clint Brown, President
120-120-120-120

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Fax 513-489-9130
E-mail: MPopovich@answergroup.com
Joan Feldon, President
40-40-40-40

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11890 Montgomery Rd.
Cincinnati, OH 45249
Ph. 513-683-6600
Fax 513-683-9177
E-mail: PBBV03A@Prodigy.com
Irwin Weinberg
20-10-20-20
(See advertisement on p. 107)

B & B Research Services, Inc.
8005 Plainfield Rd.
Cincinnati, OH 45236
Ph. 513-793-4223
Fax 513-793-9117
E-mail: BBRSRCH@aol.com
Jim Moler Jr.
20-6-20-20

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E-mail: kcravens@burke.com
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200-200-200-200
(See advertisement on inside front cover, p. 37)

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Fax 513-792-7404
Patricia A. Calo, Vice President
14-0-14-0

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Ph. 513-671-1211 or 800-336-0159
Fax 513-346-4244
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Susan Lake-Carpenter, Director
12-6-12-12

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Bernie Kearney, Vice President
25-25-25-25

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Cathy Noyes, Managing Partner
24-10-24-24

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Lynn Grome, Account Executive
85-85-85-85
(See advertisement on p. 109)

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Fax 513-791-7356
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Mary Swart Cahall, Research Manager
22-6-22-22

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Ronald Garner, V.P. Client Svcs.
40-40-40-40

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Barbara Elioff, Field Service Director
25-25-25-25

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Daniel McCafferty, Dir. Client Svcs.
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Betty Perry, Director
12-3-10-0
(See advertisement on p. 108)

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Shelly Entres, Project Supervisor
21-12-8-0

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Shelly Entres, Field Director
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Ron Kornokovich, President
35-35-35-35

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Mark Kikel, V.P. of Operations
30-25-25-25

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Fax 216-464-7864
Mary Ann Sheets, Field Director
10-0-10-0

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22-0-22-0
(See advertisement on p. 97)

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21-21-21-21

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Mark Iott, Principal
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Judi Jennings
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E-mail: info@issans.com
Peter McGuinness, President
67-67-67-67
(See advertisement on p. 119)

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Bohn Macrory, Manager
10-0-10-0

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Deanna Carter, Manager
30-20-30-30

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Roberta Cunningham
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On-Line Communications, Inc.

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Ph. 800-483-4581
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E-mail: askus@on-linecom.com
Peggy O'Connor, President
120-120-120-120
(See advertisement on p. 111)

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Fax 918-665-3388
E-mail: tsurveys@aol.com
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Hal Wright, General Manager
30-30-30-30

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Ann Kane, Manager
8-0-8-0
(See advertisement on p. 36)

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1200 S.E. 82nd Ave., #D-2
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Ph. 503-654-1390 or 800-326-0159
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Carol Woods, Director
6-4-6-6

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20-20-20-20

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59-59-59-59

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Michael Starec, Project Director
150-150-150-150

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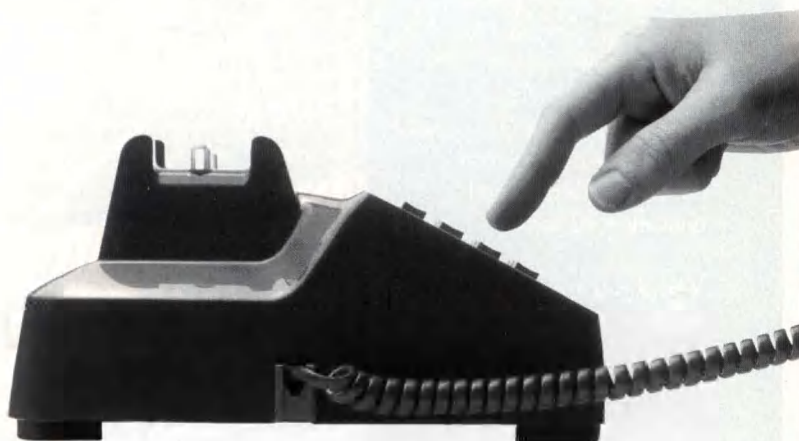
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(See advertisement on p. 112)

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Fax 215-602-2354
E-mail: Rmalmud@ncot.com
Robert Malmud, Partner
200-200-200-200
(See advertisement on p. 115)

PhoneLab Research

100 N. 17th St., 4th fl.
Philadelphia, PA 19103
Ph. 215-561-7400
Fax 215-561-7403
E-mail: Branderbit@aol.com
Ileen Branderbit, President
85-85-85-85
(See advertisement on p. 15)

Quality Controlled Services

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Ph. 800-752-2027 or 215-639-8035
Fax 215-639-8224
E-mail: postmaster@qcs.com
<http://www.qcs.com>
Lynne Sitvarin, Branch Manager
12-0-12-0
(See advertisement on p. 97)

Research Incorporated

521 Plymouth Rd., Ste. 116
Plymouth Meeting, PA 19462
Ph. 610-941-2700 or 800-220-1201
Fax 610-941-2711
E-mail: psantoro@survdata.com
<http://www.survdata.com/research>
Phyllis Santoro, CEO
15-12-15-15

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Fax 610-352-7382
E-mail: admin@response-center.com
Patrick Baldasare, President
130-130-130-130

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Broomall, PA 19008
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Fax 610-356-7577
E-mail: cjr Ricci@inet.net
Chris Ricci, President
50-50-50-50

RSVP/Research Services

1916 Welsh Rd.
Philadelphia, PA 19115
Ph. 215-969-8500
Fax 215-969-3717
E-mail: rsvp@wiltel.net
<http://www.rsvpresearch.com>
Neil J. Blefeld, President
65-65-65-65
(See advertisement on p. 12)

Sky Alland Marketing

Research Division
1400 Union Meeting Rd., Ste. 120
Blue Bell, PA 19422
Ph. 215-619-4900
Fax 215-619-4999
E-mail: data-group@netreach.net
<http://www.skyalland.com>
Bruce Shapiro, Center Manager
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Ph. 215-442-9000
Fax 215-442-9040
E-mail: bshandler@intersearchcorp.com
<http://www.sofresresearch.com>
Bruce Shandler, CEO/President
100-100-100-100

Survey America
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E-mail: SurveyAmerica@worldnet.att.net
Douglas Elliott, President
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Robert Malmud, Partner
Dan Margherita, Partner
200-200-200-200
(See advertisement on p. 115)

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Fax 215-972-1788
Mort Reich, President
200-30-200-200

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Fax 610-359-1824
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Fax 412-279-1002
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38-38-38-38

Direct Feedback
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Fax 412-394-3660
Alan Mavretish, Project Manager
20-16-20-20

Guide Post Research
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Fax 412-823-8300
E-mail: GDE PST@aol.com
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Amy Stalczynski, Field Director
15-0-15-0

Noble Interviewing Service, Inc.
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Pittsburgh, PA 15216
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Fax 412-343-3288
Alma Noble, President
20-0-20-0

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McKeesport, PA 15132
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Fax 412-672-4406
Fran Leifheit, Vice President
110-60-110-60

PERT Survey Research
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Ph. 860-242-2005
Fax 860-242-4857
E-mail: pertsr@aol.com
40-35-40-40

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300 Mt. Lebanon Blvd., Ste. 2204
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Ph. 412-341-8770
Fax 412-341-8774
Barbara K. Womack, President
15-2-15-0

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Indiana Center
699 Philadelphia St., Ste. 303
Indiana, PA 15701
Ph. 215-442-9000
<http://www.sofresresearch.com>
Bruce Shandler, CEO/President
125-125-125-125

TeleData Research
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Ph. 412-242-6200
Fax 412-731-9510
E-mail: drmtldr@usaor.net
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50-50-50-50

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Paul Weener, President
20-20-20-20

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225 Stewart Rd.
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87-87-87-87

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Emerson Smith, President
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Elizabeth B. Buchanan, President
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22-7-22-22

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Janiell Johnson, Vice President
28-0-28-0

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Fax 605-332-8722
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Rick Bauermeister, Director of Bus. Dev.
96-96-96-96

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Fax 800-480-0861
E-mail: Mktdevlp@aol.com
<http://www.MDARESEARCH.com>
John Choate, President
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Fax 901-682-2471
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<http://www.pwiresearch.com>
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Denise Terkos, Manager
84-84-84-84

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Fax 615-399-9171
E-mail: TNRG@ix.netcom.com
Glyna E. Kilpatrick, Owner/Field Director
13-0-13-13

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Ph. 615-298-5117
Fax 615-298-5668
E-mail: gfuson@mindspring.com
Greg Fuson, Acct. Mgr./Cnslt.
20-16-0-0

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(See advertisement on p. 48)

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Ph. 512-454-5271
Fax 512-453-3307
Cathy Langan
155-155-155-155

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Carlos H. Arce, President
75-60-60-60

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35-20-35-20

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Euess, TX 76040
Ph. 212-741-8133
Edward Blank, President
175-175-175-175

Edward Blank Associates, Inc.
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Arlington, TX 76006
Ph. 212-741-8133
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Jerry W. Thomas, President/CEO
65-65-65-65
(See advertisement on p. 25)

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Ph. 817-265-2422
Fax 817-261-0707
E-mail: rgates@dssresearch.com
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Dr. Roger Gates, President
50-50-50-50

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Fax 972-490-3919
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Nancy Ashmore
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Fax 972-960-5859
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Fax 972-450-8456
Nancy Monnier, Vice President
120-120-120-120

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Ph. 940-566-6668
Fax 940-566-0671
E-mail: david.johnson@marcresearch.com
David Johnson
123-123-123-123

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Fax 214-630-6769
Kelly Lynn Ireland, Facility Director
18-0-18-0

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Richard Harris, Vice President
25-8-25-25

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12-0-12-0
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Fax 214-750-1015
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Linda Adams, Owner/Director
25-20-5-0
(See advertisement on p. 116)

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E-mail: CQSI@aol.com
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Noel Roulin, President
50-15-50-50

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Fax 203-777-1807
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Jerry Lindsley
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Stafford, TX 77477
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Fax 281-240-3497
Patricia Pratt, Field Director
60-4-60-4

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Ph. 281-444-0040
240-240-240-240

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E-mail: dp.info@pdq.net
David Parker, Director
10-10-10-10

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Ph. 713-266-MARS
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<http://www.marsresearch.com>
Kerry Woodward Palermo, Dir. of Ops.
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Fay Parker, President
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Fax 713-783-4238
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Andrew Martin, Vice President
24-8-24-0
(See advertisement on p. 117)

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Fax 281-486-3831
E-mail: postmaster@qcs.com
<http://www.qcs.com>
Diana Reid, Branch Manager
20-0-12-12
(See advertisement on p. 97)

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Fax 713-956-2593
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Mary Jo Martin, Dir. Rsch. & Database Mkt.
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Fax 281-893-8811
George Workman, Vice President
112-112-112-112

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Fax 806-744-0327
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David McDonald, Sales/Marketing Dir.
90-60-80-80

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Fax 210-680-9906
Richard Weinhold, Vice President
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E-mail: Gallowaytx@aol.com
Linda K. Brazel, General Manager
66-66-66-66

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Waco

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Fax 817-634-1661
David Johnson
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Luis Carter, Director
35-27-35-35

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250-250-250-250

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Tom Beggs, Director of Marketing
300-300-300-300
(See advertisement on p. 57)

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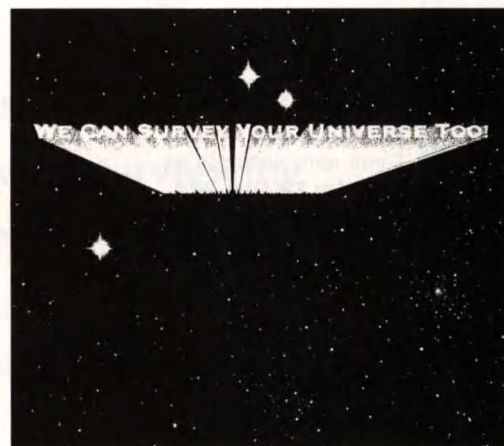
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Bryan K. Ward, Survey Ops. Manager
27-27-21-21
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Research Industry News

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Steelville, Mo., 65565. Phone 573-775-4550. Fax 573-775-4560.

F-Squared Market Research + Consulting, Moscow, Russia, has celebrated its first anniversary. The firm has two Moscow offices housing a central location test facility and a focus group facility.

ACNielsen Corp., Stamford, Conn., has launched an audit-based retail measurement service in India.

U.K.-based **IMS SelfMedication** is using Pulse Train's Bellview CAPI and its pen computer technology for Motivations, its new consumer tracking service.

Sky Alland Marketing, a Columbia, Md., provider of research services and customer relationship management programs, projects a 285 percent increase in revenues from its financial services client in 1998.

20/20 Research Inc., Nashville, Tenn., was rated the number one focus group facility in the U.S., according to a study by Impulse Surveys. The firm

received an overall score of 90 out of 100.

Clearwater Research, Boise, Idaho, has opened a second facility in Council, Idaho, which will serve as a satellite data collection facility.

Market Insights, Inc., has moved to 2000 N. Ocean Blvd., Suite 102, Boca Raton, Fla., 33431. Phone 561-750-1123.

Directions in Research, San Diego, has opened a new 100-station phone facility. For more information call 800-676-5883.

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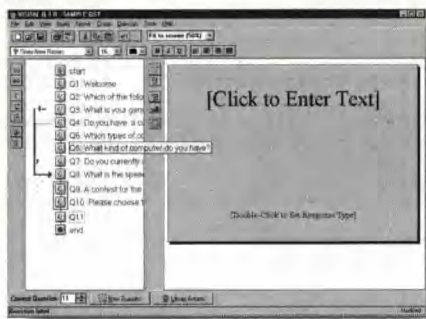
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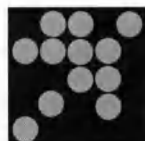
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Trade Talk

continued from p. 130

Phillips says.

"If you look at video of inexperienced shoppers, they're all over the place. They're using their conscious attention, they're not scanning, they get very tired, and they go home with only half the things they want. If you see a shopper who has learned to shop and they're using these schemata, they're very relaxed. We've done research to show that their eye-blink rate goes down. The eye-blink rate is correlated to the degree of conscious attention, so we can show that they are processing the store subconsciously. When they see something that arouses their interest, they click in their consciousness, their eye blink rate will go up."

Visuality's in-store research has found that people scan for very small cues or clues from packaging to identify the product field, the brand and its positioning in the market. "For a retailer or manufacturer the crucial thing is, how do you get in contact with that subconscious scanning? If your product isn't saying, 'I'm here, Buy me! Buy me!' you're not even going to be thought of."

Research misses the mark

Because a lot of shopping behavior is second nature,

Phillips believes research on shopping is often ineffective. Consumers are being asked to talk about something they may not be aware they're doing. Or, as he puts it, "You can't say to someone, 'Excuse me, how were your synapses working recently?'"

He cites an example of a paint brush manufacturer who came to Visuality after focus groups failed to turn up valuable information. The only important point of difference respondents expressed in the focus groups was that the bristles fell out of cheap brushes and didn't fall out of better-quality ones.

In in-store research, brush buyers exhibited a number of interesting behaviors. The researchers saw respondents feeling bristles, running them up and down their palms, holding the brushes to see if they felt good in their hands. "The research had to be done in the store because once people were away from it the information was lost," Phillips says.

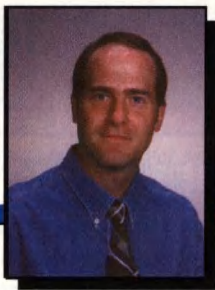
"The challenge for research is, how can you adapt to this knowledge? You can't just sit there in focus group discussions and ask how people shop. Most questionnaires try to lock into conscious behavior because they have to. I'm not bashing the market research industry; I'm in it. But the problem is that the behavior you are interested in is subconscious and it may be fleeting. I have seen some terrible questionnaires shown to me, where people were interviewed coming out of stores, and they are asked, 'Can you tell me which displays you looked at and which influenced you to buy products?' The important behavior is subconscious, and that sort of questioning is not going to get at it."

Capture attention

Making marketers' jobs even more difficult, Phillips says, is the fact that consumers have changed. Post-recession consumers are more value-oriented, more self-assured. "This consumer is cynical about manufacturers and retailers and any big institution. People want to take control. So consequently there is an empowering going on. What does that mean for shopping? People are motivated to seek variety and be themselves rather than following rules. The consumer has changed radically and if we're good marketers we've got to follow them. We have to adapt the stores, the displays, the packaging."

In addition, more and more purchase decisions are being made in-store, Phillips says. "In the U.S., 70 percent of purchases are being made at the point of sale. It used to be about 50 percent. So you've got to have not only marketing strategy and communication strategy, you've now got to have a point-of-purchase strategy. The old rules governing the predisposition to buy a product before you go into a store, which is the classic marketing creation of demand, are completely different. People are looking for the store to make recommendations. They are menu planning in-store. They are looking for ideas for gifts, what to wear.

"It creates enormous challenges for the researchers. There has been a major increase in in-store marketing and the researchers have to adapt to this and realize that they're working in a new area. The rules of the road are totally different. If you use research methods that are not in tune with the consumer's behavior then you'll get the wrong results." □



Trade Talk

By Joseph Rydholm/QMRR editor

I shop, therefore I am unconscious

They've set up a cot for me at my neighborhood Home Depot. Well, not really. But I spend so much time there I'm beginning to feel like Norm on *Cheers*. You see, after years of renting, I just bought my first house. So I need stuff. A lot of stuff. I have a garage to fill, after all. And there's a workbench in the basement that's crying for companionship (*Psst! How about bringing me a nice orbital sander?*). Plus, I've got half a dozen remodeling projects going.

So I've been doing a lot of shopping lately. Some of it has been enjoyable, some has been traumatic. Take my first visit to Home Depot. Please. Orange shopping cart gripped in my sweaty palms, I wandered agog through aisle after skyscraper-like aisle of fixtures and fittings and blades. I felt like I'd been dropped onto the Martian surface. What the heck is all this stuff? Who uses it? How am I ever going to

find the WD-40?

Successive visits have been easier. And when I shop the other retail behemoths I'm getting better at tuning out the "noise" and finding my way to the products I need (and a lot of those I didn't know I needed until I got to the store.) I don't feel the urge to flee anymore (except when I walk into a Wal Mart — I keep expecting that scary price rollback smiley face to come zooming down the Tupperware aisle at me).

All in all, I've adapted quite well to shopping the megastores. Hugh Phillips would be proud of me. Phillips is a senior lecturer at De Montfort University and research director at Visuality Research & Design in Oxford, England. He maintains that as stores have gotten bigger, taxing our already limited attention skills, people have learned to cope by learning to shop. "Stores are just too big to shop in. You have stores that are 100,000 or 200,000 square feet. It takes people an hour to shop them. They also have to cope with 200 or 300 other customers, a barrage of signage, etc.," he says.

Visuality's niche is applying observational research and cognitive psychology to packaging design, store environments and merchandising planning. "Our emphasis has been on how people shop," Phillips says. "Can we understand the psychology of the *shopper* as opposed to the psychology of the *consumer*? Because all the evidence is stacked up to say that they are different. It's amazing how complex it is, understanding how people scan, how they make their decisions, how they identify the branding of a package or the market positioning of a product. You can't summarize it in one word. People use peripheral vision. They use a two-stage decision making process. They use quite complex methods of engaging and disengaging their attention."

To survive the shopping process and avoid information overload, consumers have to subconsciously scan the store and its shelves until a product or product type they're looking for captures their attention. "They have to learn routines called schemata, pre-programmed behavioral responses triggered by the environment, like a macro on a computer,"

continued on p. 129

Farcus

by David Waisglass
Gordon Coulthart



"Listen to your customers, Greenham.
But don't take 'no' for an answer."

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