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Quirk's MARKETING RESEARCH Review

June 1998

Practical applications in marketing research

Health care research issue

- Pfizer talks to physicians to improve health inventory
- Creating effective DTC advertising
- Mapping program aids hospital system's service expansion

1998 Omnibus Research Directory

Quirk's
MARKETING RESEARCH Review
Practical applications in marketing research

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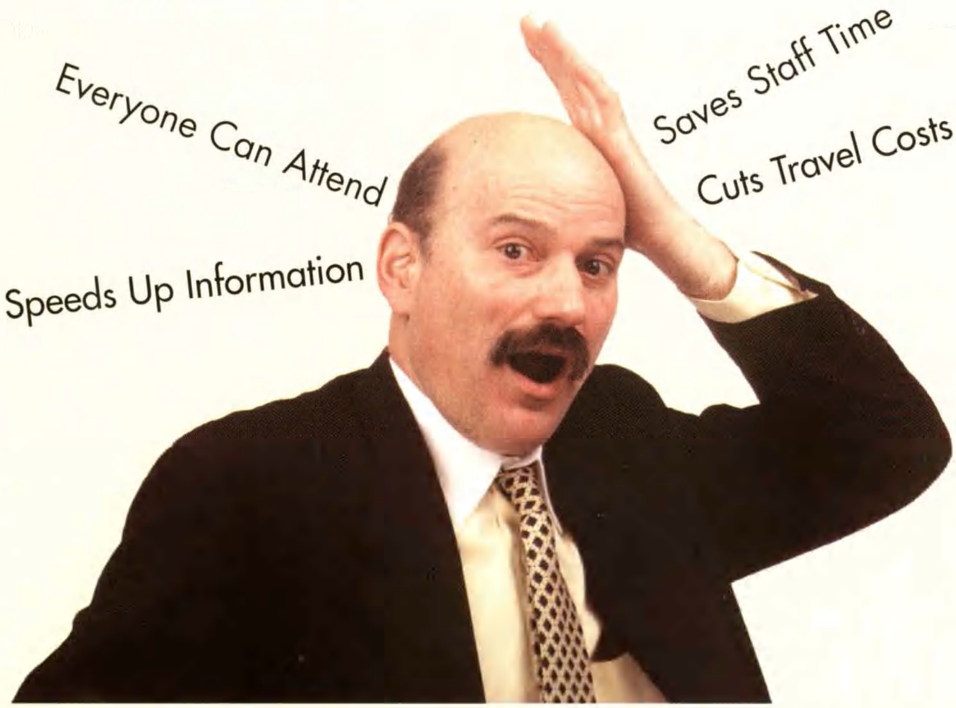

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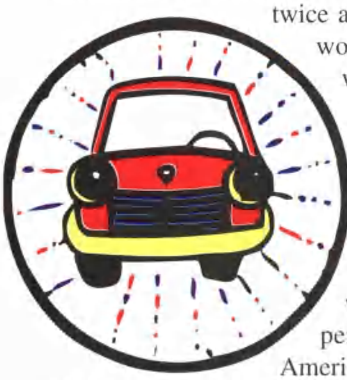
Car washing: a monthly task

A Maritz AmeriPoll found that a third of American men wash their cars at least once a week, compared to just 17 percent of women. Women seem to count on rain to do the job, since 42 percent only wash their cars every month or two. Not surprising, men are twice as likely as women to wash their cars more than once a week. As a whole, 72 percent of Americans wash their cars at least once a month.



When it comes to choosing car-washing methods, most Americans get out the bucket and sponge and turn on the hose. A whopping 46 percent prefer to wash their cars by hand at home, with men (51 percent) a little more likely than women (41 percent) to choose this method. Other methods include an automatic card wash at a gas station (23 percent), do-it-yourself at a car wash establishment (16 percent), and a hand-wash and interior cleaning service (15 percent).

Women are nearly twice as likely as men to choose the wash and cleaning service — 19 percent of women, compared to 10 percent of men. The automatic car wash is a favorite among adults 65 and older, preferred by nearly one-third of them. Young adults, on the other hand, go for the do-it-yourself method at the car wash, used by 28 percent of that age group. Maritz AmeriPoll is a national consumer poll conducted regularly by Maritz Marketing Research Inc., St. Louis. Results are based on telephone interviews with American adults. Accuracy is within ±3.09 percent. For more information call 800-446-1690.

American teens' $50 billion grocery bag

The American teenagers' impact on family grocery purchases exceeds $50 billion annually, an average of $58 per teen household per week, according to a study commissioned by Channel One Network, a provider of news and information-based programming for teenagers.

The "Teen Grocery Shopping" study found that teen households ring up annual grocery store purchases of $100 billion. Nearly $20 billion ($19.6) are purchases directly influenced by teens (made specifically at a teen's request), while another $32 billion is indirectly influenced by teens (consumed by the teen and other household members).

Not surprisingly, leading teen-influenced categories are snacks, desserts and beverages, which account for 24 cents of each grocery dollar spent in

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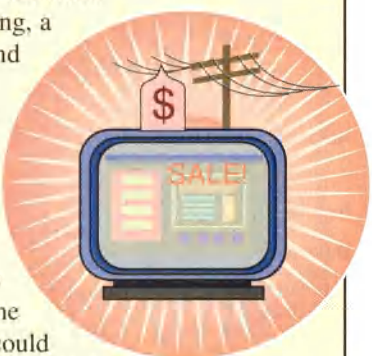
Business marketers turn to Internet

Five years ago, there were two commercial (.com) Internet Web sites. Today, there are more than one million of them. Relatively few business and government buyers had Internet access back in 1993. Today, half (51.0 percent) of all purchase decision-makers in the U.S. use the Internet in their job, and 85.9 percent expect to use the Internet for job-related purposes in the next five years, according to a study by Penton Research Services, the research arm of Penton Publishing, a Cleveland-based business information and media company.



"Business marketers have worked hard to get Web sites up and running in recent years, and this is reflected in their print advertising," says Ken Long, director of Penton Research Services. An analysis of advertisements that appeared in 12 Penton business magazines in September 1992 found that none of the ads listed an Internet address readers could visit to get more information, and practically none (0.2 percent) provided an e-mail address. In September 1997, 60.9 percent of the ads in the same 12 magazines supplied an Internet Web site address, and 17.7 percent listed an e-mail address.

Seven out of 10 purchase decision-makers surveyed by Penton said that they expect to respond to more ads over the next five years by visiting the company's Web site (72.2 percent) or by sending e-mail to the company (73.7 percent). Why? "No muss, no fuss, and it can be done at any hour of the day or night," said one executive interviewed. More than half (55.1 percent) of the respondents also expect to use the Internet to purchase products or services for their organization in the next five years.

These and other research findings are outlined in the new study, "Industry Inquiry Trends." The report presents the results of a survey of 676 managers, executives, engineers, and purchasing agents in the United States, who are involved in buying decisions for their organization. The overall margin of error for the survey is ±4 percent at the 95 percent confidence level. For more information call 800-736-8660, e-mail research@penton.com, or visit the company's Web site at www.pentonresearch.com.

Rewrite of Ci3 CATI System

Sawtooth Technologies, Inc., Evanston, Ill., has released a rewritten version of its Ci3 CATI System for Computer-Aided Telephone Interviewing. The new release, Ci3 CATI for Windows, offers a number of enhancements: more advanced quota controls make it possible to design more complex studies; multiple quotas mean more respondents can be assigned to either exclusive or multiple quota cells; inbound calling capabilities let interviewers retrieve sample instantly based on any unique identifier; a commercial database permits larger sample databases and more user-definable fields within those databases as well as a wider range of import/export formats; expanded reporting capabilities; more detailed productivity reports; password protection; links to ACA, CBC and other modules; international interviewing capabilities; and increased station capacity. For more information call 847-866-0870 or visit the company's Web site at www.sawtooth.com.

New Internet search tool

The WebTools Company, a Vermillion, S.D., subsidiary of VisualMetrics Corp., has released Mata Hari, a desktop search tool for knowledge workers, professionals and others researching information on the Internet. The software extends features found in current metasearcher, off-line browser, filter and document management products.

Users submit queries through Mata Hari to Internet search engines such as Yahoo, Hotbot, Alta Vista or Excite. Mata Hari retrieves the actual documents identified by the engines, removes duplicates, and then filters, scores, indexes and stores results in a desktop database. Searches can be immediate, work in the background, or run during off hours when Internet connections may be faster.

Users can pose multiple queries at the same time, in simple sentences or using structured (and, or) syntax, to one or all of the 100 supported engines. Mata Hari evaluates potentially thousands of Web link references against the queries and its flexible site and document filtering. Final, accepted results can be as large as 1,000 complete Web documents and 65,000 unique terms. Users can further search and manipulate the results databases using all of Mata Hari's features.

Mata Hari is a Windows NT or Win95 application. It is being distributed and supported solely via the Internet. Its price is $79.95. The complete version 1.01 software may be downloaded for a free 30-day evaluation at: http://thewebtools.com.

Mapping software offers 50GB of data

GeoLytics, East Brunswick, N.J., has released of CensusCD+Maps, a demographics and mapping software product combining 50 gigabytes of data with thematic mapping capability.

CensusCD+Maps lets users create colorful thematic data maps, down to the neighborhood level of census block groups, with no mapping or GIS experience required. All of the data, boundaries, and software to create results are on the one disc.

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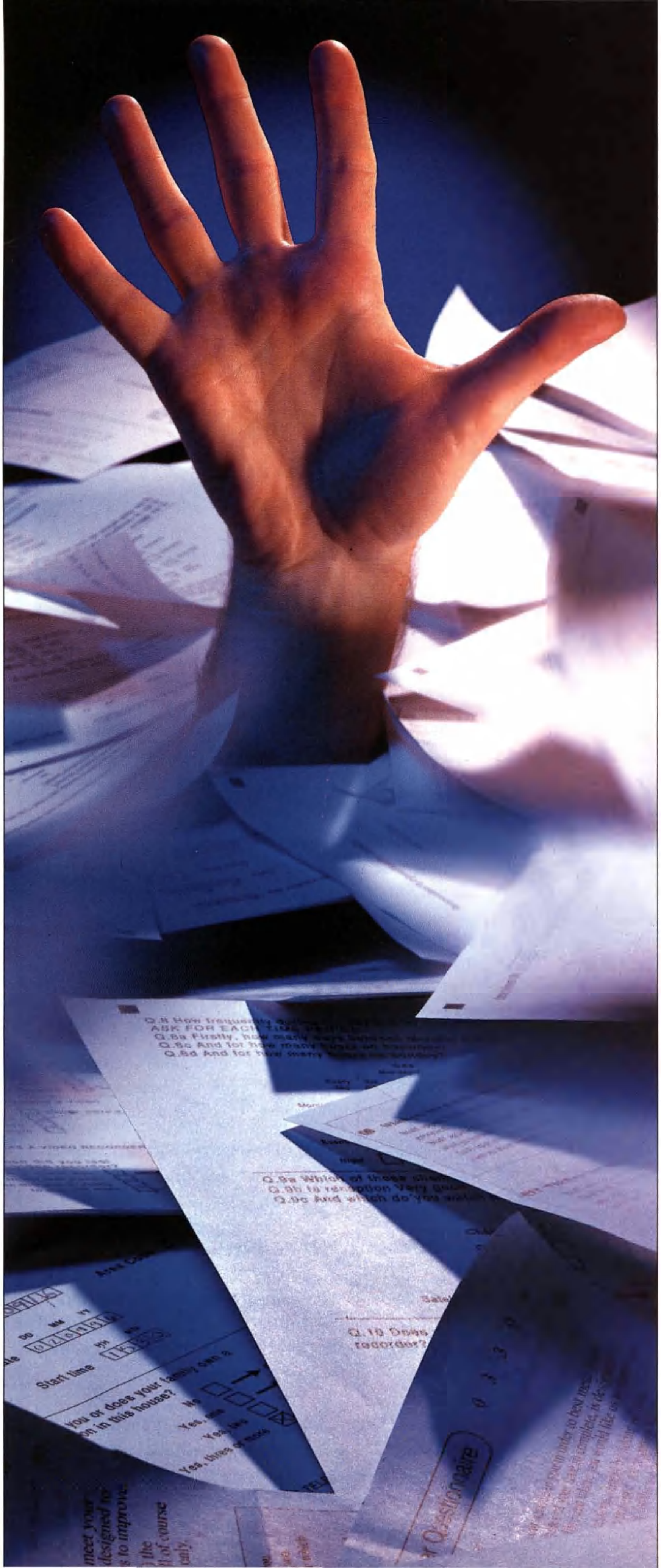

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Names of Note

Elaine Madansky has been promoted to marketing research project manager at *Abbott Laboratories Diagnostics Division*, North Chicago, Ill.

William Salokar has joined the Atlanta office of *Elrick & Lavidge* as account director. Previously he was product and research manager at The Georgia Lottery. Also in the Atlanta office, **Marsha White** has been promoted to vice president. In the Chicago office, **Larry Gulledge** has been appointed to regional manager. In the Dallas office, **Michele DeKinder-Smith** has been promoted to vice president.

SOFRES Intersearch, Horsham, Pa., has named **Ken DePinto** senior vice president and group director of the newly created Taylor Nelson SOFRES Healthcare Group in North America. In addition, **Shannon Vanden Berg** has been named senior project director in the firm's Automotive Group in Detroit.

Kari Johnson has joined *C. J. Olson Market Research*, Minneapolis, as market research assistant.

S. Michael Suplick has been named to the newly created position of chief operating officer at *Rockwood Research*, St. Paul.

James O'Hara, Jr. and **Ted McMillin** have joined the Dallas office of *Burke Marketing Research* as senior account executives.

ACNielsen, Stamford, Conn., has named **Paul McNeill** senior vice president of global marketing.

Information Resources, Inc., Chicago, has named **Kim Feil** division president for marketing, product management and business solutions, and **Peter Dietz** division president for technology and software development.

Feil

Dietz

The following have been named to the management team for *MRCGroup's* new data collection center in Las Vegas: **Glynis Giangrande**, senior project manager; **Alan Bumacod**, project manager; **Pam Auld**, phone center tech manager; **Sam Stipsky**, senior telephone center director; **Maryann Welsh**, telephone center director.

Susan Northey, an associate research director at the Milwaukee office of the *Cramer-Krasselt* advertising agency, has been named a vice president.

James Porchey, owner and CEO of *Porchey Research*, St. Louis, has been named to the advisory board of the University of Texas at Arlington's Master of Science in Marketing Research program.

John Sadler has joined *Quality Controlled Services*, St. Louis, as a telemarketing account representative.

Research Industry News

Maritz Marketing Research Inc., St. Louis, has received the 1998 Marketing Excellence Award from Ford Motor Company in recognition of outstanding service and performance. This is the sixth year in a row that Maritz has earned the honor.

Forrester Research, Inc., Cambridge, Mass., has opened its European Research Center in Amsterdam, Netherlands. Forrester Research B.V. will serve as a hub from which Forrester will assess how emerging technologies will affect business developments taking place in the European Union. The European Research Center will also propel Forrester's European sales effort, previously conducted through its U.S.-based offices in Cambridge, Mass., and resellers in Europe.

New York-based **Audits & Surveys Worldwide** has opened a new office, Audits & Surveys Europe, Ltd., in Dublin, Ireland. Anne Hastings will head the new office, which is located at 26 Upper Pembroke St., Dublin 2, Ireland. Phone 011-353-1-678-5000. Fax 011-353-1-678-5566.

Symmetrics Marketing Corp. has moved to 4820 S. Mill Ave., Suite 200, Tempe, Ariz., 85282-6730. Phone 602-456-8999. Fax 602-456-6306.

David's Phone Center has moved to a new location, allowing it to increase capacity from 48 to 74 CATI stations. The new address is 505 Pershing, Pocatello, Idaho, 83201. Phone 208-232-1818. Fax 208-232-1466.

Colwell & Salmon Communications, Inc., an Albany, N.Y., telephone marketing and research firm, will open a satellite office in Glens Falls, N.Y.

Digital Marketing Services, Inc., Dallas, will conduct Web site evaluation studies for the Direct Marketing Association.

NFO Worldwide, Inc., Greenwich, Conn., has completed the acquisition of CF Group, Inc. NFO purchased 100 percent of CF's outstanding stock for approximately $20 million (CAN), consistent with terms and conditions previously announced.

Sky Alland Marketing, Columbia, Md., is scheduled to open a customer communications center in Milwaukee this month at 4915 South Howell.

Market Development Inc., has opened new offices at 600 B St., Suite 1600, San Diego, Calif., 92101. Phone 619-232-5628. Fax 619-232-0373.

For the first time since 1993, **ACNielsen**, Stamford, Conn., reported a profitable first quarter. First-quarter net income rose $5.9 million, or $0.10 per share, over last year, to $1.8 million, or $0.03 per diluted share, including an after-tax expense of $1.9 million, or $0.03 per share, for Year 2000 modifications. The impact of foreign currency translation lowered reported net income by $1.3 million, or $0.02 per share, for the quarter.

In separate news, the firm has announced a major expansion of its television audience rating service in China. It plans to expand its use of its PEOPLEMETER technology from a single panel now operating in Shanghai to nine other major Chinese cities over the next two years.

Kansas City, Mo.-based **Market Directions, Inc.**, has opened a Web site at www.marketdirections.com.

In April, *The Wall Street Journal* reported Cincinnati Bell's plans to spin off its billing and customer management businesses, including **Matrixx Marketing Inc.**, and its Matrixx Marketing Research division, into a new company called Convergys.

Intellipost Corp., San Francisco, a loyalty marketing firm, is expanding its BonusMail opt-in advertising service to include a set of market research tools provided by New York-based CLT Research Associates.

Greensboro, N.C.-based **Homer Market Research Associates, Inc.**, has acquired T&K Research Centres, Inc., Atlanta.

Mintz & Hoke Inc., an Avon, Conn., advertising firm, has formed Advantage Field & Focus, a focus group facility with recruitment and field research services. The firm is located at 40 Tower Lane, Avon, Conn., 06001. For more information call Rosalie Renfrew at 860-679-9722.

Information Resources, Inc., Chicago, announced first-quarter 1998 net earnings of $1.9 million, or $0.07 per diluted share, compared to essentially break-even results in the first quarter of 1997. For the first quarter ended March 31, consolidated revenues were $119.2 million, up 13 percent over the first quarter of 1997. Revenues from the company's U.S. businesses were $94.6 million, an increase of 10 percent compared to $86.1 million for the corresponding 1997 quarter.

ICT Group, Inc., Langhorne, Pa., reported revenues for the three months ended March 31 were $27.0 million, a 32 percent increase compared to revenues of $20.5 million for the first quarter of 1997. Net income rose 41 percent to $666,000 from $473,000 in 1997 and operating income increased 65 percent to $1.1 million for the first quarter of 1998 from $637,000 in the same period in 1997. Diluted earnings per share for the quarter ended March 31 increased 50 percent to $0.06 per share from $0.04 per share in the first quarter of 1997.

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.

An interviewer requesting anonymity, but whom we'll call Tina, is particularly adept at interviewing young children. One of her secrets when interviewing little girls is to establish rapport by first asking the girl what her middle name is. Then, whatever name is mentioned, Tina says to the girl, "What a coincidence. That's my middle name too!"

During recruiting for one study, after assuming 15 different middle names over a two-day period, she asked a little girl what her first name was. The girl responded, "Tina."

"What a coincidence. That's my name too!" said Tina the interviewer. To which Tina the respondent said, "You're just saying that so I'll talk to you!"

Tradeoff Marketing's Harris Goldstein reports about a business trip to Florida. Goldstein had a wealthy cousin named Harry Chernin who lived in Chicago, but kept an apartment in Miami. When Goldstein told Chernin where he was going, his cousin volunteered his unused apartment to Goldstein and his wife for their stay. When they arrived at the apartment, they found it was decorated far more elaborately than they'd imagined.

As Goldstein's wife discovered, even the bathroom was luxurious. After taking a look around, she called Goldstein in to marvel at its appointments. "Look!" she exclaimed. "Your cousin is so wealthy that he has personalized faucet handles. They're embossed with his initials."

Goldstein looked at the handles. Sure enough, the one on the left was embossed with an "H" and the one on the right was embossed with a "C."

A supervisor at a mall facility, who requests anonymity, reports that one of her interviewers often talked to God. He'd look upward, focus his ear, and respond to whatever question he'd heard, muttering things like, "Why should I do that?"

This interviewer, before he was let go, refused to speak with any member of the staff, except for a young, bearded male interviewer, whom he called Jesus, and the supervisor, whom he called the Virgin.

While the supervisor never detected anything wrong with this interviewer's questionnaires, who really knows whether the opinion on some toothpaste powder was really that of a head of household who qualified for the study, or God (who did not)?

Interviewer Damien Rommal of PKM Marketing Research in the Los Angeles area reports occasionally being rebuffed by shoppers he attempts to interview in the mall. The most frequent response of this type is, "No habla Englais," provided by Hispanic consumers. But he was shocked one afternoon when a consumer he approached responded in a robot-like staccato voice, "Sorry. I am unable to conjugate the vowels necessary to compile sentences within the confines of the English language."

Jewel Alderton of Facts Consolidated tells about discussing a political study with a client. When the client suggested doing intercept interviews at high-traffic strip malls, since a visual needed to be shown, Alderton indicated that past experience with surveys using this methodology never yielded enough Republicans.

"Oh," said the client, "What can we do about that?"

"Well," Alderton said, "We could weight for them."

"How long do you suggest we wait?" asked the client.

Assuming that Alderton is right, and that Republicans are underrepresented, I wonder if Republicans are less likely to stop for an interview, or less likely to shop at strip malls. Maybe Republicans all shop at upscale regional malls...

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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Have you ever wondered . . .

By Gary M. Mullet

Editor's note: Gary M. Mullet is president of Gary Mullet Associates, a Lawrenceville, Ga., data analysis and consulting firm. He can be reached at 770-931-1060.

In response to a reporter's question, a member of one of the Sweet 16 basketball teams in this year's NCAA tourney discussed and defined regression analysis. His answer had to do with the idea that if he (or an opponent) had a bad game, his next game would probably be better, due to the regression effect. The question was posed to the student-athlete after it was learned that he had to take an examination on regression analysis while on the road for this session of March Madness. As most readers know, his example of the regression effect closely parallels that of the relationship between fathers' and sons' heights, which some sources say gave rise to the term regression analysis over 100 years ago.

What follows are answers to several other questions, some dealing with regression analysis, some not. The pages of this column have covered a wide variety of topics and some of the answers below are borrowed liberally from them and some aren't. (Remember: stealing from one author is plagiarism; stealing from several is research. Since I stole that statement from only one source, it's plagiarism. I'd love to give credit but honestly don't know the original source.)

Why do some regression coefficients have the wrong sign?

What exactly is meant by the "wrong sign?" Computationally, hardware and software are at the stage where, for a given data set, the signs are undeniably calculated correctly. (Such was not necessarily the case back in the days of punched cards, about which more later.) There could be a couple of things going on. First, your theory could be wrong; that is, the sign might not really be wrong. Second, it could be a statistically non-significant result, in which case the sign of the coefficient is meaningless. Third, it might be that, due primarily to collinearity in the data set, you are comparing the sign of a partial regression coefficient with expectations from a total regression relationship. The partial coefficient involves the relationship of the particular independent variable of interest accounting for what goes on with other independent variables. The total coefficient ignores what goes on with the other independent variables and looks at only the relationship between the criterion variable and a single predictor.

It's not at all uncommon to see a positive sign attached to a correlation coefficient involving a single predictor and single dependent variable (predictee?) and yet the regression coefficient for this same predictor, when other predictors are in the equation, will be negative. Run a handful of regressions with a larger handful of predictors and you will almost assuredly see several such "wrong" signs. They may or may not be cause for concern, depending on the intent of the study for which you are doing regression analysis in the first place. If you are among those who use beta coefficients to allocate relative "importance," you might be in for a headache due to these sign reversals.

How does sample size impact regression and multiple correlation?

Well, we see a couple of things going in opposite directions here. A smaller sample will usually show a larger R^2 and a smaller number of statistically significant predictors than will a larger one from the same population. It's a degree of freedom phenomenon and makes a least a modicum of sense.

Remembering back to when you took geometry (or, in my case, vice versa), you saw that two points perfectly determine a straight line, three points determine a plane, four points determine a hyperplane in four-dimensional space, and so on. Regression analysis is really doing nothing other than estimating the coefficients of the equations for those lines, planes and hyperplanes. It should be fairly easy to see that the fewer data points we have, the better the fit of the planes to the data, usually. Thus, R^2 will be larger with fewer data points, generally speaking. That's why some of your models are "better," if you use R^2 to determine goodness of the model as many are wont to do, when you look at small subsets of the sample and compare the results with the total sample. Economists were among the first to recognize this and in most introductory econometrics texts you'll find a definition of R^2-adjusted-for-degrees-of-freedom. This adjusted R^2 is routinely shown as part of the output of most current software packages. It's very disconcerting when this value shows up as negative. If it does, you are woefully short on sample!

As for the number of significant predictors, as the number of observations increases, the denominator in the statistic that determines whether a regression coefficient is significant decrease, other things remaining constant. Thus, it's "easier" for a coefficient to be statistically significant and, with bigger samples, more will be declared significant than when you are analyzing smaller samples.

As you are no doubt aware, samples that are inordinately large are troublesome in other statistical analyses, too. Even with simple t-tests for independent means, big samples will show that even minuscule sample mean differences are significant. In these cases, as well as those above, the real issue is, are the results substantive in addition to being statistically significant? The answer may be that they are not, just because the sample was too large.

Why are my R^2 values so lousy when I use yes-no predictors?

Yes-no predictors, or dummy variables, come about when we use qualitative (e.g., gender, brand used most often, education category, etc.) rather than quantitative variables as predictors in a regression analysis. You won't find much about this in print, but Michael Greenacre wrote about it, maybe with a proof, a few years ago in a *Journal of the American Statistical Association* paper. For our purpose here, it's something to acknowledge and, in part, it points out what many consider the folly of comparing the goodness of regression models by using R^2.

If you have some statistically significant regression coefficients and your regression equation makes a degree of substantive sense, then you might want to ignore the magnitude of R^2 when using dummy predictors. See

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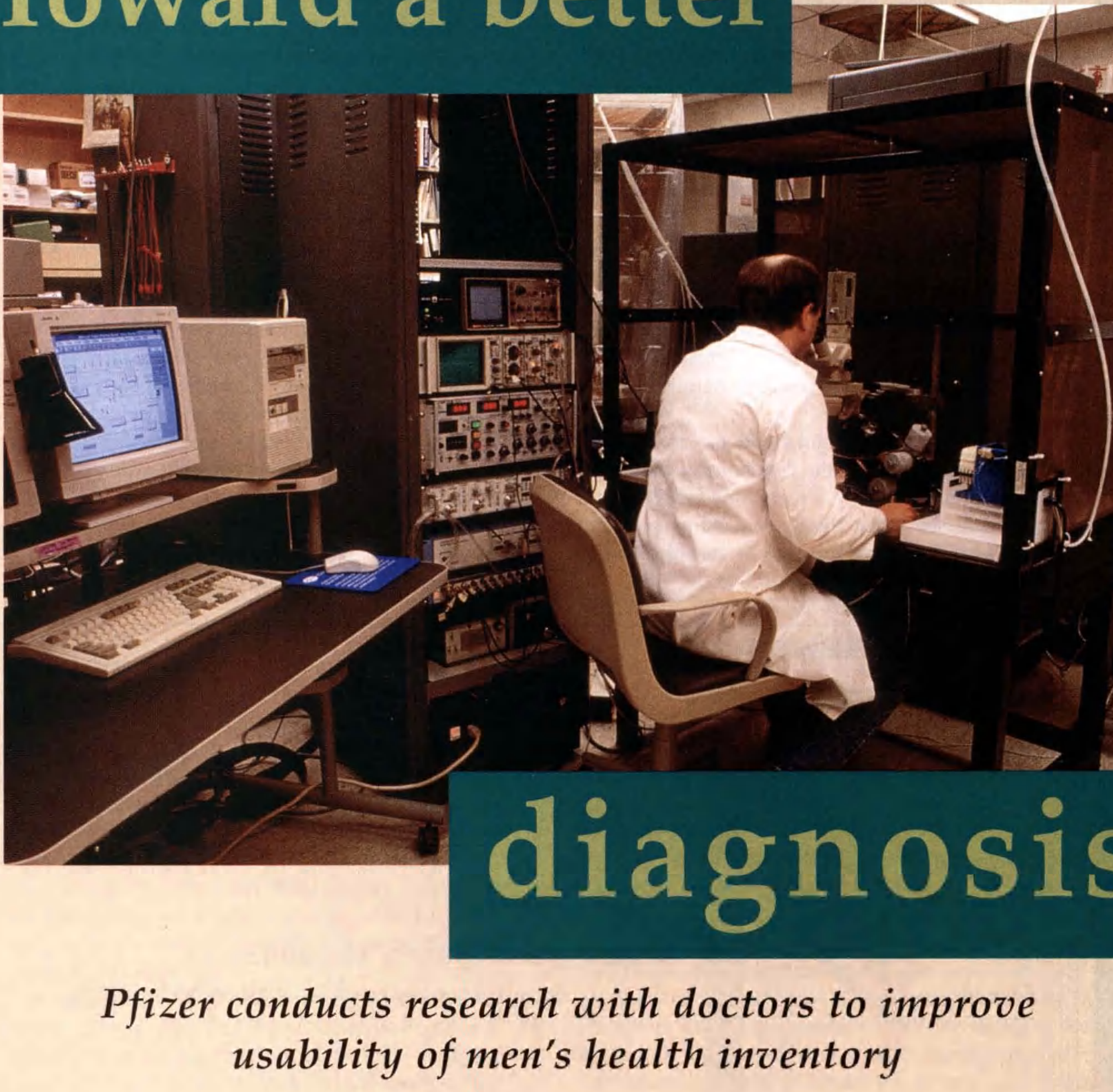
Toward a better diagnosis



Pfizer conducts research with doctors to improve usability of men's health inventory

By Kimberly Rengle

Editor's note: Kimberly Rengle is a San Diego-based freelance writer specializing in data-mining issues and computer technology.

Pfizer Inc., a New York-based global health care company recently received FDA approval for and began marketing a new drug called Viagra, the first oral treatment for male erectile dysfunction (ED). Recognizing that ED is an embarrassing condition (a fact that many experts believe results in under-diagnosis and under-treatment) Pfizer is using a multi-faceted marketing campaign to create awareness about male erectile dysfunction while promoting Viagra.

For part of the campaign, Pfizer is developing outcomes research tools for primary-care physicians, urologists and other professionals. One of these tools is the Sexual Health Inventory for Men (SHIM:IIEF-5), a five-question, self-administered diagnostic test that can help indicate the presence or absence of ED. The SHIM:IIEF-5 can serve as a clinical aid to prompt further investigation of ED and a discussion about available treatment options. This diagnostic test was developed using a combination of Pfizer's research efforts and data analysis tools.

Creating the test

Pfizer awarded an ED research grant to a team led by Dr. Raymond C. Rosen, an internationally recognized ED expert. The research resulted in the development of a multi-dimensional scale for assessing ED. This scale, the International Index of Erectile Function (IIEF), became the primary efficacy measure in the Viagra phase trials, and was published in 1997.[1]

For use in research and clinical settings, this questionnaire is a self-administered, 15-item measure that is cross-culturally valid and psychometrically sound, with the ability to detect treatment-related changes in patients with ED. The IIEF addresses five relevant domains of male sexual function — erectile function, orgasmic function, sexual desire, intercourse satisfaction and overall satisfaction. The SHIM:IIEF-5 is based on this IIEF measure.

After the clinical research, Pfizer led a worldwide market research effort that interviewed primary-care physicians and urologists to determine the IIEF's usability in those commercial settings. The findings indicated that an abbreviated version of the IIEF would increase acceptance by doctors and patients, making it more a valuable diagnostic tool for identifying patients with ED. Pfizer then tasked its researchers to use proven statistical methods to reduce the 15-item IIEF to five questions that would conform to the National Institutes of Health (NIH) definition of ED[2], while best distinguishing between the presence and absence of ED.

"We used our rich dataset and a combination of statistical techniques to determine a diagnostically optimal set of five questions that would conform to the NIH's definition of ED," says Dr. Joseph C. Cappelleri, associate director of biometrics in the statistics group at Pfizer Central Research in Groton, Conn. "In addition, we needed an objective way to identify the point that best distinguished between the presence and absence of ED."

The SHIM:IIEF-5 was developed using data from four major studies of men diagnosed with ED and two control samples of men with no history of ED. The data for the diagnostic evaluation of the SHIM:IIEF-5 included 1,152 men: 1,036 with diagnosed ED and a control group of 116 men without ED. For the trial data, men met inclusionary criteria, such as being 18 years or older, being in a stable, sexual relationships for the last six months, and having a clinical diagnosis of ED for at least six months. Men in the control group — those not clinically diagnosed with ED — were volunteers recruited from an outpatient community health center.

"Male erectile dysfunction is a very sensitive topic, and our research shows that an easy-to-use, robust and accurate instrument is necessary to aid in diagnosing the condition," Cappelleri says. "When patients' scores indicate the presence of erectile dysfunction, doctors can further investigate the situation and then discuss treatment options that can lead to improving the patients' health, self-esteem, quality of life and interpersonal relationships."

Methods for success

The data were analyzed using Salford Systems' CART classification-and-regression-tree software and logistic regression methodologies in concert. CART was used to rate the relative importance of each of the IIEF's 15 items in terms of their ability to discriminate between the presence and absence of ED.

The Pfizer Central Research campus in Groton, Conn.

Salford Systems' CART is based on the original CART code developed by statisticians from Stanford University and the University of California at Berkeley. The software considers all variables at the same time and categorizes the data by binary (two-way) splits. This series of splits is displayed as a decision tree, which the software

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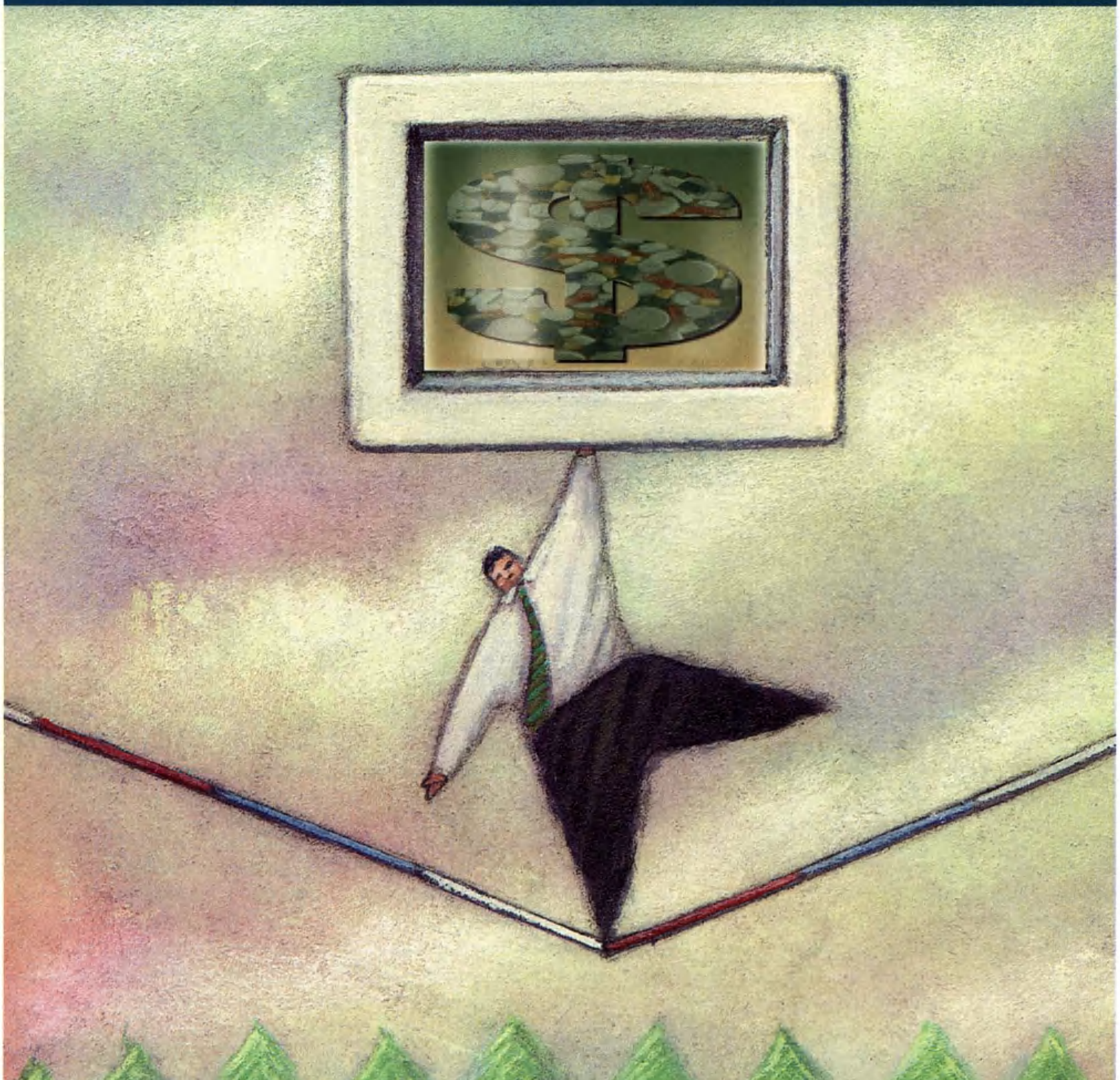
Rx DTC advertising:



a delicate balance

By Michael Greenfield

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Effective Rx direct-to-consumer (DTC) advertising is typically more difficult to create than traditional advertising of non-Rx products to consumers, since it has to achieve a delicate balance between attitudes and behaviors among two very different audiences — consumers and physicians. Think of the challenge this presents for pharmaceutical companies and their agencies when developing an Rx DTC advertising campaign. How much information do you release to the consumer? How compelling can you make your product relative to competitors' products, before a physician-patient discussion turns into a debate, creating dissatisfaction and potential backlash among physicians?

Perhaps the most challenging part of achieving this delicate balance involves tuning the advertising in a manner that results in a positive — or, in the worst case, neutral — reaction from physicians. In this regard, consider the following example of two radically different physician reactions to Rx DTC advertising.

"Advertising Rx drugs directly to consumers makes me uncomfortable. I end up wasting a great deal of time fielding phone calls from patients questioning the choice of the medication I have put them on. Moreover, in the office, I end up diverting time from my examination and diagnostic activities to correct misperceptions regarding their medication — misperceptions based on advertising they have seen. It doesn't help me, and it doesn't help the patient."

Contrast this physician's point of view on the effect of direct-to-consumer advertising for Rx drugs with the following: "Done properly, DTC advertising can be helpful. Many of my patients are better informed, ask smarter questions, and end up feeling more confident about the drug therapy that I have prescribed. It has actually made my job easier."

The importance of achieving the delicate balance has grown geometrically. DTC advertising for Rx products was virtually nonexistent 10 years ago — today there are presently 26 pharmaceutical companies spending an estimated $1 billion annually on DTC advertising in the U.S.

Addressing the balance issue becomes even more critical as the Food and Drug Administration's Division of Drug Manufacturer Advertising and Communications (DDMAC) begins to allow more information to be released to the public within the context of Rx DTC advertising. Achieving a balance between the two targets was not really much of an issue just a few short years ago. Rx DTC advertising that operated under the DDMAC guidelines of prior years often left consumers scratching their heads in puzzlement, unsure about what medical condition was being addressed (never mind forming an opinion about the drug's superiority relative to competing brands). However, times have changed. And, while the result of this change is clearly positive — consumers now can at least understand what medical condition the drug being advertised is supposed to address — these changes result in the need to achieve the delicate balance.

A closer look

To understand some of the dimensions of this balance, let's take a closer look at the actual needs and issues of the various groups involved. Let's start with consumer needs. Generally, the consumer is looking for marketing communications that inform them that a specific condition can be treated, and create a connection between the condition and a specific drug. The result: The consumer is now provided with sufficient information to engage in a physician/patient dialogue relative to his or her condition.

Physicians' needs relative to Rx DTC advertising are somewhat more complex. Most physicians we speak with are generally comfortable with advertising that addresses the first consumer need noted above — the ability to treat certain conditions with

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How far is too far?

Hospital system uses a time and distance analysis to plan for inpatient obstetric services

By Anthony C. Stanowski and Sharon B. Dajnowski

Editor's note: Anthony C. Stanowski is the former director of planning and market research, Jefferson Health System, Philadelphia. He recently accepted a position with the Sachs Group, a Chicago-based company that specializes in planning and marketing software for the health care industry. Sharon B. Dajnowski is planning analyst, Main Line Health, Philadelphia.

Main Line Health (MLH) is a four-hospital entity of the Jefferson Health System (JHS) located in suburban Philadelphia. Among the full range of services, three of our facilities (Bryn Mawr, Lankenau and Paoli Memorial Hospitals) provide obstetric services. The Paoli site opened in 1995 based upon the growing population and demand for services in the western suburbs.

An earlier article by one of the authors presented a centroid analysis study (GIS World, January 1993) which demonstrated this growth and movement west. Since Lankenau borders the eastern end of the MLH service area, we need to understand whether we should allocate more resources west or continue to offer services at all three campuses. Bryn Mawr is only four miles west of Lankenau.

In order to create efficiencies in providing obstetric care services, MLH is examining the potential to consolidate services in the eastern part of its service area. We wanted to understand if the difference in travel distance and time would be a significant obstacle to obstetrics patients based on the facility they are currently using.

An analysis was developed to measure the mean travel time and distance of patients to each of the three facilities. The mean travel time and distance of each patient to the site at which they received care would be compared to the time and distance to each of the other facilities in our system.

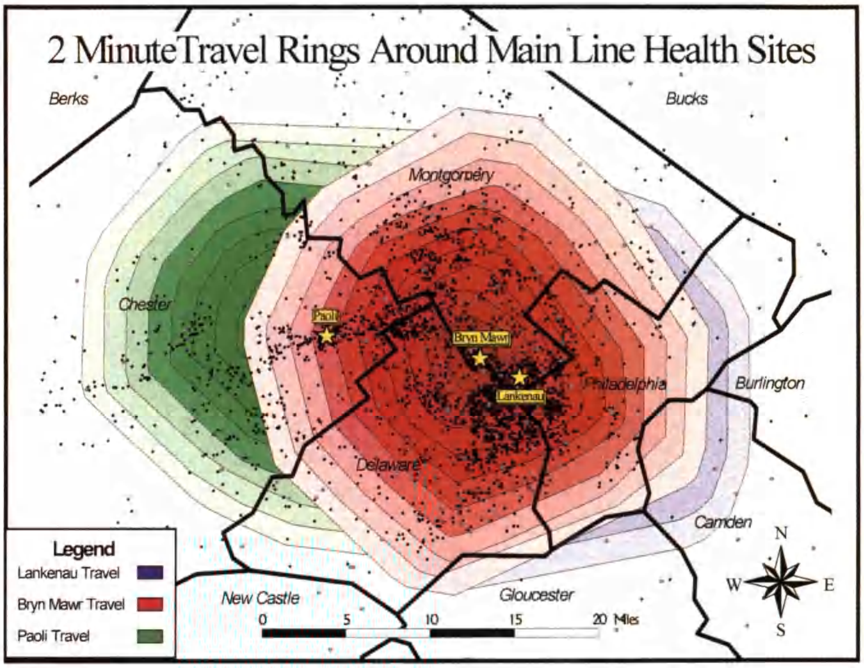
One potential scenario is the consolidation of inpatient obstetric services at Bryn Mawr Hospital. Outpatient services would continue to be provided at current locations. We wanted to

understand the hypothetical impact on Lankenau Hospital patents if they were to receive their inpatient services at the Bryn Mawr Hospital. Increasing travel times significantly would reflect poorer access to patients, and would not be in keeping with MLH's mission.

The difference in mean travel time and distance of primary importance is that of Lankenau patients going to Bryn Mawr Hospital. We examined Bryn Mawr patients going to Lankenau Hospital, and travel times to Paoli for comparative purposes.

Geocoding patients

We created a database of patients (including their full address) admitted to one of the MLH facilities' obstetric service for the period of one year. Each address was geocoded to the address level, where possible, and then to the ZIP code level. We were successful in geocoding 70 percent of the addresses to the address level. Thirty percent were geocoded to the population centroid of the ZIP code of residence.



Assignment of travel distances

The calculation of the travel distance was performed by using Atlas GIS, a mapping program of ESRI, Inc., Redland, Calif. The distance from each geocoded item to each

Table 1: Assignment of Travel Times

Conditions	Number of Patients	% of Total	Time Assigned for Missing Values
Patients who live > 50 miles from site to which they were admitted	37	1%	Excluded
Patients < 50 miles and over 22 minutes to all 3 facilities	398	8%	40 Minutes
Patients < 50 miles and 22 minutes or less to 2 facilities but over 22 minutes to 1 facility	500	10%	30 Minutes to facilities not timed
Patients < 50 miles and 22 minutes or less to 1 facility but over 22 minutes to 2 facilities	635	13%	30 Minutes to facilities not timed
Patients < 50 miles and 22 minutes or less to all 3 facilities	3,263	68%	"Actual Travel Time" (High+Low)/2
Total	4,833	100%	

MLH site was calculated using the straight line method. To prevent skewing of the data due to outliers, addresses that were 50 miles or greater from the site of service were excluded. These patients are only 0.8 percent of the entire patient population being examined. The mean travel time to each site based on the site of service was determined by calculating the mean travel distance by site of service to each facility.

Assignment of travel times

The calculation of the travel time was performed using ArcView Network Analyst, also by ESRI. The travel time is calculated using an algorithm based on the travel distance along a segment of road times the estimated speed limit for that segment of road. Although this method does not account for traffic variances and road construction, it is felt to be a good approximation to estimating travel time.

Two-minute travel time rings were built around all three sites (reference Map 1). We assigned the travel time of each patient to each facility based on the proximity of patients. If patients were within 22 minutes of our facilities, we assigned the mean travel time in the ring ((High Time/Low Time)/2). For example, if an obstetric patient lived in the 2 to 4 minute ring around a site, her travel time would be 3 minutes ((4+2)/2).

Travel times over 22 minutes were assigned based on Table 1.

Table 2: Travel Time and Distance To MLH Facilities by Facility Patient Used

Facility at Which Care Was Received	Travel to Facility					
	Distance in Miles			Time in Minutes		
	Bryn Mawr	Lankenau	Paoli	Bryn Mawr	Lankenau	Paoli
Bryn Mawr	8.6	10.7	9.4	14.8	16.2	16.2
Lankenau	7.4	7.5	11.6	12.7	12.2	19.3
Paoli	14.5	17.8	8.6	23.5	25.6	14.8

The result

Table 2 shows the results of the analysis. It was determined that the mean travel for patients who received care at Lankenau to go to Bryn Mawr was actually closer (by 0.1 mile) but represent a slightly longer travel time (0.5 minute longer). Closing the Lankenau site to inpatient OB would furthermore be less disruptive on our patients than other alternatives.

This data is being used as additional information in determining consolidation/clinical integration is being gathered. Consumer preference information, physical plant layout, physician acceptance of change, and community concerns will need to be addressed before future consolidation can be accomplished. ❑

STRATEGIC MARKETING TRACKING

By Jerry W. Thomas

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

Upheaval. Revolution. Transformation. These are the words that characterize the nature and magnitude of changes swirling through the marketing world. The changes include: the information superhighway, interactive media, the telecommunications revolution; the growing use of promotions, the decline of traditional advertising, the rise of sports marketing, database marketing, telemarketing, conventions and shows and conferences and symposiums; the multiplication of television channels and communication mediums, the rise of new distribution systems (the superstores, discount mail order, direct television sales). All of these changes signal the end of an era.

Some will say it was the golden age of marketing, this past now vanishing into the quicksand of change. The simple world of three television networks and stable retail distribution channels has vanished. The simple world of supermarkets and Nielsen is gone forever. So what's a marketing executive to do? How can she keep track of the effects of marketing actions in the midst of upheaval, revolution and transformation?

In contrast to media and technology, the marketing fundamentals (strategy, positioning, awareness, continuity, product quality, concentration, message communication and image projection, etc.) remain as constant and as important as ever. The fundamentals don't change just because the information superhighway is created, or interactive media, or multiplicity of television channels. The marketing fundamentals must remain as the lodestars in the marketing universe, to guide marketers through the cosmic confusion of changing media, changing technology and changing competitive forces.

We have found that strategic tracking of consumer awareness, perceptions and behavior delivers essential marketing intelligence to help guide marketers through the turbulence and helter-skelter of rapid changes in marketing technology, media and distribution channels. The ultimate goal of marketing is to influence and control the ultimate consumer. Therefore, if the perceptions, attitudes and behavior of that ultimate consumer are monitored over time, we will know if the cumulative force of all marketing activities is influencing the ultimate consumer. If we track consistently, it is possible to monitor the effects of specific marketing programs as they are introduced.

Strategic tracking answers a number of important questions:

1. How your brand's awareness is

trending over time, relative to competition. Awareness is the single most important marketing variable in many product categories.

2. How your brand's image is evolving over time. Think of "image" as the character or personality of a brand's awareness. The strategic management of brand image is one of the most important goals of marketing.

3. What advertising messages do your consumers remember about your brand, and how do these messages change over time? Advertising messages tend to undergo learning and memory distortion as they are interpreted and remembered by consumers. Therefore, the only way to know for sure the "net, net" communication of your advertising is to track advertising message recall.

4. What variables define your optimum target market? Who are your brand's heavy users, nonusers, light users? The identification and monitoring of your brand's optimum target market is one of the easily calculated outputs of good tracking research. What are the demographics (and the correlates) that define the optimal target market for your brand. Which market segments should you focus upon?

5. What impact are your competitors having in the marketplace, and how are competitive activities influencing your brand? Overreaction and underreaction to competitive initiatives constitute some of the greatest marketing mistakes, historically. It's really important to know, as early as possible, whether a new competitive product or new competitive advertising campaign is a real threat, or just smoke and vapors. Good tracking research allows you to monitor and assess competitive threats — before it's too late to react.

If you should decide to pursue strategic tracking research for your brand, here are some suggestions to keep in mind. Tracking research, like everything else, can be good or bad depending upon how you design and execute it.

1. Telephone surveys are typically the best way to track awareness, image, and advertising message recall. These telephone surveys can be

continuous (i.e., conducted every day) or pulsed (conducted at a point in time, such as the last week of each quarter). Some types of tracking research can be conducted by mail (e.g., recognition tracking, or image tracking, or brand share tracking), and the quality of the data from mail surveys can be high. Mail surveys, however, are not very good at measuring awareness (because respondents can ask other household members or look up the answers).

2. Good sampling is essential. The greatest (and often least visible) mistakes in tracking research are usually sampling errors. The sampling plan and management of the sample are absolutely crucial to consistently accurate tracking data. The samples from month to month and year to year must be identical in every way, or else the resulting data will not be comparable. Here are some common sampling errors to avoid:

a) Sample definition too narrow. If your target audience is females 21 to 29, that's fine for guiding media placement. All too often, however, the target audience becomes the specification for the sampling plan for tracking. Therefore, only females 21 to 29 are interviewed in the tracking research. Suppose your advertising turns out to be really effective among women 34 to 54 instead of women 21 to 29. You might have canceled a very effective campaign because it appeared to be failing among the target audience. Also, it's possible your advertising is working among 21 to 29 year olds, but driving all other age groups away. If we were only sampling the 21 to 29 segment, we would have overlooked this critical failing.

Remember, always define the sample for tracking research very broadly and inclusively. The purpose of tracking is to tell us what's happening in the marketplace, and a too-narrow sample almost always defeats this objective.

b) Variable definition of sample. Never allow the things you want to measure to be a part of the screening criteria that admits someone into the survey. For example, you would never want awareness of a product category or awareness of a brand to be part of the screening criteria for a tracking survey, if one of the purposes of the tracking research was to measure awareness. Likewise, you would never want "past 30-day usage" of a category or brand to be a part of the sampling criteria, if the purpose of the study is to measure changes in usage over time. Awareness and product usage are variables that can change as a result of your marketing activities or competitive initiatives, and change from season to season. As these variables change, they can change the composition of the tracking sample, and destroy the comparability of the survey data across time.

c) Sampling without replacement. If the universe is limited (say, you are tracking attitudes among your 1,000 dealers), and you take dealers out of the sample as they are interviewed, then the composition of your sample is gradually changing as interviewing progresses — and this makes the interviews from one time period incomparable to interviews in another time period.

Remember, if the universe is small and limited, then sample with replacement. That is, once a respondent is interviewed, put that respondent back into the sample for the next wave of interviewing. An alternative solution is to divide the original sample into discrete, matched subsamples, and then use one of these subsamples for each subsequent wave of interviewing.

d) Randomize sample within quota groups. Even though most projects begin with a random sample, things can happen which destroy randomness. For example, most samples are organized by time zone (so that households across the United States are called at the appropriate time). Sometimes, as part of this processing to organize the sample, the sample is put into some type of order (area code, prefix, alphabet). As a final quality control procedure, always randomize the final sample within each quota group. Then, no matter how the sample is worked, you will end up with a random sample.

e) Limit sample to force callbacks. The research company must limit the size of the original sample, so that the callback cycle is properly triggered. If too many telephone numbers are put in the initial sample, then it is likely that no callbacks will ever be made. The study is completed before the interviewers ever work through the original sample. The recommended policy is to release 70 percent of the planned sample, and then gradually introduce the remaining 30 percent of the sample as the callback cycle is completed on the initial sample. Typically, a primary number in the sample should receive a total of three calls (an original call and two callbacks).

3. The questionnaire must remain the same from month to month and year to year. Changes in the questionnaire (even something as seemingly innocent as a change in question order) can create unexpected changes in the results. Simply changing one word in a question can change the results. Therefore, keep the questionnaire constant over time. If you want to modify, add or delete questions in a tracking study, do it toward the end of the questionnaire — so that the changes will not distort the key measures in the first 80 percent of the questionnaire.

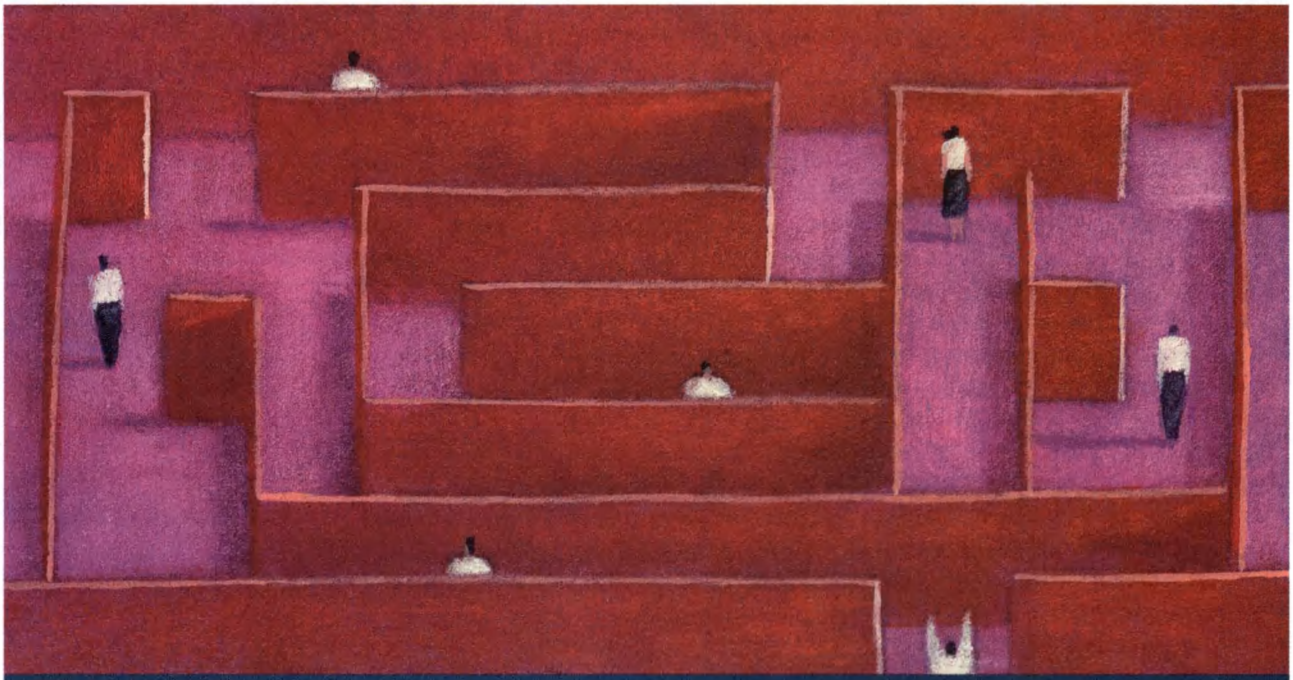
4. All interviewing procedures and controls must remain constant. Changes in the minutia of training, scheduling, monitoring and supervising interviewers can inject unplanned changes in tracking study results. The briefing and training instructions for each specific tracking study must remain unchanged over time.

Editing, coding, data cleaning, and tabulation must remain constant over time. Changes in the way "no answers" or "blanks" are handled, changes in how many multiple responses are accepted, and a hundred other "minor" tabulation details can change tracking results over time.

A great long-term threat to the accuracy and integrity of a strategic tracking study is gradualism. That is, small incremental changes in methods and procedures that accumulate over time and gradually destroy the comparability of the tracking data. For ongoing tracking studies, it is recommended that monthly meetings be held with everyone working on the project, to review and reinforce exactly how the study is to be executed. Likewise, specific quality control guidelines and standards must be developed and maintained for each long-term tracking project.

Needless to say, once you choose a research company to do a tracking project, you should stick with that one company (unless that company's performance is unsatisfactory). Changing research companies every year or two on a long-term project almost always guarantees that the data will not be comparable.

The true strategic value of tracking research is fully realized only after several years of consistent measurement of your ultimate consumers. Several years of longitudinal data really tell a story, but it's a strategic story, a grand panorama of your performance in the marketplace compared to your competitors, as played out during the different phases of the business cycle. With this strategic road map, it is possible to plot grand strategy, and monitor your successes and failures in pursuing that strategy, regardless of the day-to-day confusion and chaos in the quicksand world of upheaval, revolution and transformation. ❑



Research should be integrated and lead to strategic decision-making

By Michele Holleran

Editor's note: Michele Holleran is founder of Holleran Consulting, York, Pa. She can be reached at 800-941-2168.

Many companies today are misguided in the way they view market research. Instead of seeing research as a foundation for strategic planning, enabling them to see the big picture view of what's happening in external markets, they see it in a microcosmic fashion. In other words, they look at research as "projects," basically unconnected to one another. Rarely are the pieces of research integrated; rarely are research projects planned in conjunction.

Market research directors at major firms have complained that their internal customers (other divisions and business units) don't use the research results for maximum effectiveness. These customers' myopic view leads to tactical decision-making at best, and seldom are they concerned with how their research connects to other departments' research.

Surprisingly, the best research planning and integration is done at small and mid-sized companies with a marketing director or vice president (but no market research director or department). These organizations know how to get the most our of their research investment for several reasons: budgets are tight, the competition is fierce and their market position is uncertain.

Case study: Answering many questions

Take the case of an organization that makes products for the residential building trade. This manufacturer needed answers to many questions, and needed those answers simultaneously. To make the assignment more challenging, there were tactical questions ("What benefit should we emphasize in our trade advertising campaign?") as well as strategic questions ("Should we vertically or horizontally integrate our product line?" and "Who are the most promising segments of the market?").

The objectives of the assignment, which was to be carried out over a five-month period, were lengthy and entangled with one another. In essence, this manufacturer was consolidating all its research monies into this single integrated project. Methodologies included focus groups with contractors, one-on-one interviews with wholesalers, an analysis of competitor strengths and weaknesses from the market's perspective, a statistically valid phone survey with 475 contractors, sales and market share analyses, product feasibility testing, and a brand recognition/perceptual mapping study. The budget was less than $100,000 and the manufacturer wanted a consultant who would not only conduct all forms of research, but interpret what it meant so the executive team would all be on the same page as they engaged in the strategic decision-making process.

Valuable findings uncovered

The manufacturing firm learned a lot through this market research. Here's a sampling:

- An underestimated competitor in one region of the country was seriously eroding the company's market share.
- A strategic partner selected to secure distribution with wholesalers had a shaky and inconsistent reputation with the target end user.
- The company's star product, once an innovator in the category, was now perceived as a "me too" product with no salient differentiating benefits.
- An important and lucrative segment of the market was being underserved by all competitors.
- A new product developed by the company was focusing on a benefit the end user ranked low on a list of benefits.
- A key influencer (the architect in this case) had no favorite brand and was frustrated by the lack of specialized niche products he needs.
- Price was a purchase driver at the distributor level, but not at the end-user level.

How results were reported and used

The consultants conducting the research consolidated the findings into one report. The presentation was designed to share key pieces of learning that would have strategic import to the company. In addition, individual reports focusing on tactical questions were delivered separately, addressing the research pertaining to sales, marketing, product development and customer service. The umbrella report presented to the executive team gave them the foundation needed to discuss and challenge strategic initiatives. It put the group on a level playing field, providing a block of data that was rich and complex but, at the same time, easy to understand.

The consultants' approach was straightforward — here's what we've learned, how does this jibe with what you know, what further data need to be gathered to get us all comfortable about what's really happening in the marketplace?

This approach to sharing information is dynamic in nature, not a bunch of meaningless statistics in a binder that gets filed away. The interactive nature of the presentation acknowledges that the consultants aren't pretending to understand every nuance of the market, but that they bring value as a result of not knowing the nuances. The research results are pure, unbiased and without pretense.

Translating research into action

After several strategic planning sessions facilitated by the consultant, the executive team adopted eight strategic initiatives that were designed to more than double the company's growth in a five-year period and seize the position of market leader in the category.

Says the vice president of marketing who commissioned the research and planning initiative: "The research had a profound impact on how we began to see the real world. We realize we were looking at things through rose-tinted glasses. It was a wake-up call for us. Our consultants brought back all kinds of data that we found hard to believe at first. We made them go back several times to document and corroborate specific findings that seemed questionable to us. The interaction was frustrating, intimidating and gratifying all at the same time. It was a true growth experience for our executive team. This is the way to do research — comprehensively and with a fresh set of eyes." ❑

The words of marketing research

By Joseph A. Koerner

Editor's note: Joseph A. Koerner is president of The Qualis Company, a St. Louis research firm. He can be reached at 314-367-4981.

As researchers, we are, ideally at least, always looking outward, to find answers, to test concepts, to discover "personalities" of products, to identify segments, to measure sales potential, to evaluate advertising.

Last summer a few of our neighbors gathered on a warm Friday evening to see the new deck we had just completed in our back yard. We've known our neighbors for a while, and we all know more or less what each of us does for a living. But this evening one of the men, a pilot, said he would like to know more about the business of marketing research, because, he said, "I really don't have any idea just what you do."

"Rich," I said, "it's kind of hard to

explain without giving you a few examples." So, I told him vaguely about a few recent projects, but I couldn't really give too much detail because of confidentiality. He seemed somewhat satisfied with my response, and we turned back to our other neighbors sitting on the deck. It turned out to be a spontaneous and pleasant martini evening.

Rich's question, and my answer, popped into my mind the next day. It was raining, so I couldn't go out to work in the garden to finish up a few things around the periphery of our new deck. I decided to resurrect an old hobby, and do a little word search. (I still apply some of the skills I had learned long ago studying Latin.) I made the mistake, or had the good fortune, to pull my two volumes of the Oxford English Dictionary (OED) from the book case. My OED is one of these highly compact publications, with four pages reduced and printed on one, so you need a magnifying glass to read it.

I spent more than two hours looking up words and their origins. One word and idea led to another. The words took me down a sometimes cynical path that ended abruptly without warning on a hard rock of insight which a career in this business will not let me disprove. There's some humor in what I learned, and certainly an abundance of meaning about the pleasures and intellectual challenges of marketing research.

The Oxford Dictionary defines words, cites origins, and gives histories of how words come into use. It is the authority in our language. I started with the basics, and looked up *market*. Market comes to us through the Latin. The basic verb is *mercare*, which simply refers to what took place in the markets, that is, trading. This root give us a whole raft of words we use frequently: merchant, mercantile, merchandise, to name just a few. This basic discovery doesn't tell us a whole lot, except to bring to mind that way back in antiquity people traded items in what became known as markets. The history of the English usage gets a bit more interesting.

One of the first recorded appearances of market as we use it in our professional jargon shows up in what is known as the *Coston Chronicles*, over 500 years ago, in 1480. Here's the actual text, in reference to some person who could be one of the first examples of the modern marketing practitioner:

He lete cry thurgh his patent in euery faire and euary market of Englond.

I think this means, in a more contemporary translation, that this man hawked his item, whatever it was, all across England in every place where people gathered to trade goods. Maybe the *faires* and *markets* referred to were the first regional malls. I was hooked, and eager to see what other 500-year-old ideas might still be viable for us today.

In a work called *The Penny Cycle, XIV* (I never found out just what this publication might have been, just that it first appeared in 1839), I found the next observation, which was the first instance of the term market used in an abstract form. I got the idea that some persons by this time had begun to give some conceptual dimension to the practice of marketing:

When the whole bulk of the articles to be sold is brought into the market . . . the market is called a pitched market; when only a small portion is brought, it is called a sample market.

1839 was right in the middle of the Industrial Revolution. Maybe *pitched* and *sample* were terms that refer to clothing. By the year 1820 England imported over 70 percent of American exports of cotton. Historians, as we read them in our college days, spent a great deal of time talking about machinery, especially in textiles, and about the growth of international trade. We heard little or nothing about how manufacturers took their goods to market, how they sold them to consumers, how they were distributed, and how decisions were made. But, someone was obviously thinking about this process.

Charles Lamb, the essayist we studied in our English Lit courses (and maybe didn't appreciate him as much as he deserved) was apparently close enough to the process to see, in 1821, the failing results of poor planning, or perhaps even greed:

They seldom wait to mature a proposition, but e'en bring it to market in a green ear.

We would have to modernize the language a bit, but all of us can think of many notorious examples in our time of what Charles Lamb had in mind. The reference to the green ear calls up images of the agrarian influence in the growth of the role of markets. One gets the idea that the terms used by Lamb reflect what was taking place among his contemporaries. The ancient practice of farmers bringing their produce to town to sell served as the anchor for other products.

About 20 years after Lamb wrote about the green ear, back over here in America, Ralph Waldo Emerson, in his ambivalent yet certain manner, gives the impression that marketing had become a very lively activity, with consequences:

This is the good and this is the evil of trade, that it would put everything into market.

This comment appeared in 1844, in a series Emerson called the *Lectures to Young Americans*.

About 40 years later, in 1881, back in England, another writer gave the impression, in a publication called *Contemporary Revelations*, that the study of marketing had taken on some formal aspects:

It is possible that merchants, bankers, etc., should be led astray by the sophism of mercantilism.

That word, *sophism*, when associated with the activity of the marketplace, sparked a little additional reflection. Sophistry is the pretense of knowledge and insight, stated in a convincing manner. Mostly it means a highly superficial explanation of something. A most discomforting thought for a consultant to ponder.

Even more discomforting for the people who pay us to work for them.

There were other words to study. But instead of going right to *research*, I decided to work through the alphabet. I felt I was on to something in this little secondary research project of mine. I quickly decided that many words in our business are best left to more advanced discussion. *Monadic*, for example, and *multivariate*, are rather obvious in meaning after some grasp of the basics. *Analysis*, however, right at the top of the alphabet, demands attention. The word comes from the Greek, and is probably one of the most descriptive in our whole professional vocabulary. It means to untie or loosen up. These are perfect explanations of what we profess to do with the data we collect. We have to collect data correctly, to be sure, and there are many pitfalls in this aspect of our business. But once we have the data, we untie it, or take it apart. Ideally, we put it back together. Maybe this, I thought, is what I should have told my friend, Rich. "We loosen bundles of information," I could have told him, "and then make it clear and understandable." To think about the analysis, I have learned from experience, is a good way to go about a creating a good research design.

The next work in alphabetical sequence was *concept*, and it turned out to be most intriguing when applied to the research process. The Latin verb *capere* means to seize or capture. A concept, therefore, in the mind. It is an idea, a thought, to which we give a shape and a name. The prefix *con* intensifies the meaning. I remembered hearing about a product manager, who, during a focus group session, became so angry behind the mirror when the participants weren't "getting it," that he burst into the room and told them exactly what the concept means! It was clear in his mind - he had captured it - but the people in the group didn't. They didn't form the same meaning. In spite of my decision to work through the alphabet, I had to jump way ahead to look up *perception*. To *perceive* something means, in the word origin of the definition and activity, to take in an idea or stimulus of some kind, from the outside. The prefix (*per*) is very important here: it intensifies the meaning of taking in something from the outside. So, it was time for reflection again: the core of marketing research may be found in just these two words. Often, the work of marketing research is to find out how to put a concept properly into the perception of another person; or, from another perspective, the task is to learn how to perceive properly what is in the other person's mind.

The commitment to a search through the alphabet simply waned. I felt like a student cramming for an exam. Words popped into my mind, and I followed them. *Proposition* was the first, from the Latin *ponere*, to place, and *pro*, a prefix meaning, literally, in front of. When you place something in front of someone, even if it is only a concept, not something actual, you are dealing immediately with perceptions.

"What a way to go about it," I said to myself with a somewhat smug smile. "I'm talking about research, using just words, not examples, and it all makes sense."

But there was the rub. It did make sense. We work in our minds. I remembered an important meeting I had with the president of a publishing company as I was getting ready to present the results of a fairly complicated study. "Remember," he said, "to distinguish between reality and perception as you present these results. There is a difference."

"Yes there is," I said, "and it is a perceived difference."

The risk of getting a bit over-academic became evident quickly. We are in a business that requires a lot of mental maneuvering. But it is still a business.

So, accordingly and significantly (it's hard to avoid using the word - look it up!), I turned to the OED entry for *business*. Here's a good old Anglo-Saxon word, with no references into the Latin and Greek. The origin in very early times is *bisignes*, meaning simply to be occupied with constant attention, engrossed, doing something that engrosses the attention. One of the earliest examples in the English language appears in the following comment in 1612 by a writer named Pasquil, in a text called *Night Cap*.

Thou hast been too busy with a man, and art with child.

Eventually the word came to refer to a commercial enterprise regarded as a going concern, which is, of course, how we tend to use it today. The earlier meaning, however, seems to describe how marketing researchers go about their businesses, totally engrossed in it, analyzing, generating graphs, drawing implications, finalizing reports, writing recommendations . . .

With the exception of the word *research* itself I could have ended my probing at this point. I decided to go on, however, at least for a few more words, chosen somewhat randomly.

I was most pleased to learn that *focus* comes from a Latin word that means hearth or fireplace. Words like this are charming in their history. Today we use the word focus for something we do, analogously, like a fixed gaze, outside of time and space, upon the flames and coals in a fire place. We are drawn to the object itself, isolating it, limiting our vision. A romantic idea. Potentially misleading, too.

Another type of research suggested itself — customer satisfaction. *Customer* grows out of the word *custom* (of course!) which is derived from the Latin *consuescere*, meaning to do things in an established way. The second word in this, the only two-word idea I analyzed, takes us to the essence of this marketing process and matter of continuing concern. The ancient origins — both components of the word stem from way back in the history of recorded language — of satisfaction can give solid direction to the entire process. *Satis* means, simply, enough; *facere* means to do or make something. Therefore, customer satisfaction means, literally, to get customers to act in a consistent, established manner by doing enough for them. The job of the researcher is to find out what is enough, and why, and how to do it. Simple, really, but I've known automobile dealers who insist that it is impossible to satisfy customers. Here is one outstanding example of this attitude which I actually heard a dealer announce to a group of customers who had been assembled to discuss their experience with the dealership. "I'm here in business to get everything I can out of you, and you're out to get everything you can out of me when you come in to buy a car."

One of the other problems I have found in recent years in the process of customer satisfaction programs is that

The word *satisfaction* refers to an activity — *doing enough.* Fundamentally, the word means to take control, often to do what is obvious in the first place. Something else usually interferes, if there is dissatisfaction.

too many times people who market goods and services seem to get the idea that only the customer is in charge of the relationship, which leaves the marketing organization in a passive role. That is not the case, in reality. The word *satisfaction* refers to an activity — *doing enough.* Fundamentally, the word means to take control, often to do what is obvious in the first place. Something else usually interferes, if there is dissatisfaction.

It was time for a decision. Do I go on? Look up more words? Look up *research*? The answer came to me in the question itself - which is what usually happens when we analyze, loosen up, and untie our information. *Decision*. The word is a challenge in itself. The Latin words are *de* and *cedere* — to cut the knot. Here's a usage in Shakespeare:

Either end in peace . . .
Or to the place of the difference
Call the swords which must decide it.

(Henry IV, iv,i,182)

All of us who have spent careers in marketing research know what it is to be challenged in our decision criteria. How many decisions are made not out of strength and insight, combined with data, but rather have been based on numbers alone. I've been in meetings where numbers alone have prevailed in a decision whether to proceed to the next steps of a product development process. In one instance I wish there had been a fight among the committee members. The issue was to decide on a positioning for advertising (look up that word, too!), based on the numbers. No one seemed to want to break out of the rational and sequential process with the emphasis on the numbers alone. The conversation that followed about advertising quickly grew animated, not because there was a strong conviction about the position (we referred to this word earlier — to place in front of) that had been selected. There was a lot of money to be committed to the advertising effort, nearly $3 million. What's exciting in comparison about a $50,000 research project? The research department had nothing further to say in the matter, except to institute one of the formal advertising tests. I learned about six months later that the numbers in the communications test for the proposed ads were so low that the client felt it was necessary to retain another advertising agency.

Now it was time to take the last step, to look up *research*. I was cautious and a bit concerned what I would find. When I found and read the entry in the OED, I was both stunned and amused. It was like the ironic similarity in Greek drama, where the elements of tragedy and humor are the same. Both are human conditions. Both occur because of something unexpected and at the same time inevitable. The Latin origin for research is *circare*. It came into English from the French *cherchez*, which means to search, as we use it today. But, the Latin word means to go around in circles!

So, if I were to give my friend and neighbor Rich the definition of marketing research I might have said this:

"Rich, my business is that of a consultant in marketing research. That means that I am totally engrossed in helping people go around in circles."

Maybe the next time we are sipping martinis on our new deck I'll lay that on him.

In the meantime, I'll reflect over what I learned. The words of marketing research brought together old meanings and new insights. I see our business becoming more and more fragmented. Methods abound, models are chosen to make effective decisions, specialists profess high levels of expertise. We know that we really don't go around in circles, and yet often when we plan our projects and our annual budgets we fall back on precedents. Recently I had a conversation with a client, a director of marketing research in a large company. He had this to say about the future of his department, and about the future of the marketing research professionals who reported to him.

"I find that those people in our department who spend time with marketing and other managers in our company are those who get invited to meetings, who get budgets approved for projects. They know how to talk something through, to get everyone's perspective. They become part of the team."

It could be well that the ancient origins of research and the other words provide good guidelines for those of us who make our living in this business. The circle idea isn't a bad one; it does imply getting back to the basics. We might do well to pay more attention to what is within the circles of our research. Have we really used all our capacities in our research? That is, do we use our instincts, our intuition? Do we go out and simply observe behavior? ❑

Survey Monitor

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the household, for a total of $25.78 weekly. Purchases most heavily influenced by teens include sports drinks (87 percent of household purchase is teen specified), breakfast bars (85 percent) and salty snacks (75 percent). Other key categories with significant teen influence include cookies (76 percent), carbonated beverages (74 percent), cereals (76 percent) and frozen foods (72 percent).

"Teenagers exercise substantial influence over family grocery buying habits and have higher volumes of consumption than their younger siblings," says Tim Nichols, executive vice president of research, Channel One Network.

The study was designed by David Michaelson & Associates, a New York research firm. Respondents collected itemized grocery and warehouse store receipts for a seven-day period and identified special requests made by teens (direct purchase influence), standing orders made by a teen (direct influence), items shared with household members (indirect influence) and items used solely by other household members (no influence). Four hundred and thirty-three responses were received from homes with 12-to-17-year-old members. For more information call Tim Nichols at 212-508-6800.

Credit cards: it's a buyer's market

Americans love to say "charge it." Even though more than half of Americans agree at least somewhat that "nothing is worth owning if you can't pay for it in cash," three out of four own and use credit cards, according to a Wirthlin Worldwide national telephone survey.

Among those who carry credit cards, the average person carries about four cards and charges around $200 during a typical month. Two-thirds spend $300 or less per month using credit cards.

Those who do not own credit cards are likely to be young, single, low income and less educated, groups which tend to have less experience or more credit risk.

To credit card issuers, the most important question is not always how many cards the customer owns or even how much they spend, rather how they pay. Of course companies need customers who pay their bills, but they would prefer people who take a longer time to pay off those bills, since most of their profits are derived from interest charged on outstanding balances.

Fortunately for them, almost three out of five credit card users admit to being "revolvers," who carry at least some balances from month to month. One in four (25 percent) of those surveyed are full revolvers who almost always carry balances. Eighteen percent say they usually try to pay off their bills, but may carry balances at times when emergencies arise that exceed their current cash flow, such as medical expenses or car repairs. Seventeen percent do their best to juggle their credit card bills, paying off higher interest rate cards first and carrying balances on others with more lenient payment terms.

More than a third (37 percent) of credit card users are what the industry calls "transactors," who pay off their full balances each month. Interestingly, transactors have the highest median monthly credit card spending of the four groups. These consumers take advantage of the convenience and the cash float offered by credit cards, while paying very little for the service.

The credit card industry is furiously competitive. When AT&T ventured into the business in 1990 with its no-annual-fee cards, issuers of Visa and MasterCards followed suit, forever changing the face of credit card marketing. It has become a buyers' market where consumers have their pick of the pre-approved, low introductory rate offers that swell their mailboxes monthly. One result has been more of a tendency to view credit cards as a commodity item. Three in four Americans surveyed (74 percent) agree with the statement, "All credit cards are pretty much alike, so I try to find the ones with the lowest interest rates and annual fees." Accustomed to getting something for nothing, almost half (48 percent) of credit card users surveyed say they "refuse to pay annual fees, no matter what benefits the card offers," and an additional 20 percent say this describes them somewhat.

Another outcome of free and easy credit cards is that customer loyalty has weakened considerably. Customers are routinely tempted to transfer balances from a card they currently own to a new one to take advantage of a low introductory rate. More than one-fourth of cardholders (27 percent) have played the "rate surfing" game. It's no surprise to industry observers that all this has come back to haunt the industry. While the number of accounts has soared over the past decade, profits have sunk just as dramatically, drained by the cost of offering inducements. Meanwhile, consumer debt and payment delinquency have climbed.

But the pendulum is beginning to swing the other way. The industry is going through some consolidation in hopes of returning to more profitable times. Ironically, AT&T announced (after eight years in the business and a Baldrige award) that it is selling off its credit card business to Citicorp.

Consumers are doing some consolidating of their own by cutting up some of those cards they acquired in the frenzy of the early '90s. Over a third (36 percent) of credit card users say they have cancelled one or more cards in the past 12 months. When asked why, 36 percent cite convenience, saying they want fewer cards to carry and fewer monthly bills to deal with. Others are winnowing down their cards and keeping those that offer the best financial terms (33 percent) or the most attractive rewards programs (4 percent). And about one in five have cancelled cards as part of a conscious effort to spend less on credit.

In a related question, 46 percent say they now use credit cards less than they did two or three years ago, while 31 percent say more. Some of these presumably have switched to debit cards, which provide the same spending convenience but deduct money directly from a checking account.

As the industry becomes increasingly competitive, credit card companies are turning to creative incentives and sophisticated target marketing in order to shore up the loyalty of current cardholders and win new ones. Reward programs, perks, value-added features and co-branding are some of the tactics used to appeal to consumers and distinguish one particular card from the crowd.

Most consumers have a primary credit card, one they use most often. The goal for the card issuer is to do whatever it takes to make sure their card is the consumer's primary card. So Wirthlin asked respondents who say they have a primary card what makes that card their favorite. Despite the question cited earlier, interest rates (32 percent) and annual fees (6 percent) drive preference for fewer than four in 10 consumers. For the majority of those responding, the coveted primary card status goes to the card that has something special to offer. Nearly one-fourth (23 percent) reach for a specific card so they can rack up rewards like airline miles, cash rebates, merchandise discounts, or points toward the purchase of an automobile. (There are even cards now which donate a fraction of a percent of purchases to your alma mater or favorite charity.) Other reasons to prefer a certain card are because it has a good reputation, because of an affinity branding, extra features, good customer service, or wide acceptance and prestige.

Buoyed by the success of these new kinds of incentives, the industry is making a turnaround. Credit card companies are signing up new vendors in record numbers, making it possible to charge everything from groceries to fast food. But they are not about to forget the lessons of the past decade. As they rebuild customer loyalty, consumers can expect card issuers to pass the costs along this time. The trend is toward new fees, shorter grace periods, higher rates, and stricter financial penalties. Some issuers are even considering tying rewards to revolving balances instead of total card charges.

As credit card issuers have adapted to a changing marketplace, they have become smarter about consumers and how they view and use credit. Some Americans view credit cards as a way to stretch their income. More than a third of those interviewed (35 percent) agree that credit cards help them "maintain a higher standard of living" than they could otherwise enjoy. About the same percentage (36 percent) say they sometimes use cards to buy what they want even when they know they don't have enough money to pay the bill in full. A third (33 percent) say they "rarely have a zero balance on their credit cards" and 23 percent say this describes them somewhat. No doubt this group includes many of the 17 percent who "don't trust [themselves] to manage [their] credit card debt."

At the other end of the spectrum, many claim they only put purchases on credit cards if they can pay the bill in full (43 percent say this describes them very well, 29 percent somewhat). Older cardholders are the most likely to feel this way. Some consumers use credit cards to spread out their payments on major purchases, such as furniture, appliances, even college tuition, while others keep credit cards to use only in case of an emergency.

As we move toward a cashless society, the stakes in the credit card business are huge. Understanding consumers will be the key to determining who becomes king of the credit card hill. Companies who succeed in becoming their customers' primary card will be those who:

• target carefully, focusing on ideal prospects with cards designed to meet their particular needs,

• monitor usage closely, so they can offer appropriate rewards to encourage increased usage,

• appeal to up-and-coming younger market segments,

• show how annual fees are offset by rewards and other incentives which pay back the cardholder,

• encourage more "casual use" of credit cards for small, everyday purchases, by emphasizing the benefits of security, convenience, and less hassle, and,

• persuade consumers that credit is not a vice, but an investment in a future gain, a tool that makes possible a better lifestyle.

This report contains selected results from Wirthlin Worldwide's National Quorum survey conducted January 9-13, 1998. Interviews were conducted by telephone with a representative random sample consisting of 1,000 adults (age 18+) residing within the continental U.S. Most of this report is based on a subsample of 729 respondents who own one or more credit cards. The margin of sampling error at a 95 percent confidence level is ±3 percentage points for the full sample and ±3.6 percentage points for the subsample of cardholders. For more information call 703-556-0001 or visit the company's Web site at www.wirthlin.com.

Most homes own exercise equipment

Adults in half of all American households own at least one piece of exercise equipment, and it is being used regularly in almost two out of three of those households, according to a national survey by the Fitness Products Council (FPC), North Palm Beach, Fla. FPC is a group of about 185 companies that manufacture and distribute exercise equipment for institutions and consumers in North America.

The survey is believed to be the first comprehensive study of adult (age 18 and older) ownership, use and attitudes toward home exercise equipment, sales of which have boomed in the past decade.

"The stereotype is that most home exercise equipment just ends up gathering dust, but now there is solid evidence that millions of people are using the equipment to good results," says Gregg Hartley, executive director of the Fitness Products Council, which sponsored the study.

The survey found that exercise equipment is owned in 49.8 million households (50.1 percent of the U.S. total 99.3 million) and used regularly in 32.3 million (32.5 percent of all households and 64.7 percent of owning households.)

The Fitness Products Council estimates that in 1996 consumers spent roughly $4.8 billion for home exercise equipment. "Just a few years ago, home exercise equipment meant a pile of weights in a boy's bedroom," Hartley says, "but today consumers are spending hundreds and even thousands of dollars for treadmills, stationary bikes, home gyms and other equipment. We think the trend will continue for many years."

Here are some additional findings from the survey, which was administered by Target Management, Inc., Wilton, Conn., and involved telephone interviews with 1,607 individuals. Exercise equipment was defined as "items such as free weights, home gyms, stationary bikes, ski machines, rowing machines, treadmills, stair-climbers or spot toners such as thigh exercisers or abdominal trainers."

• About 49.6 million Americans aged 18 and older say they own and use home exercise equipment at least once a week. Another 4.9 million say they own it and use it less often than once a week, but "regularly." These two groups — totaling 54.5 million adults — are described as "owner-users" in the material that follows. They represent about 28 percent of the total adult population (191.9 million) and 57 percent of those adults who own exercise equipment (96.1 million). In addition, one or more adults use equipment in 18 percent of those households where the original owner does not use it.

• Owner-users — those who own equipment and use it regularly — are evenly divided by sex and age. Males constitute 51.9 percent. By age groups, they are: 18-24: 13 percent; 25-34: 24 percent; 35-44: 23 percent; 45-54: 18 percent; 55+: 22 percent.

• Most owner-users are involved in other sports and fitness activities. Only 20 percent say they pursue no other activity at least once a week.

• The main reasons non-users gave for not using the equipment or for stopping were boredom (42 percent) and lack of time (41 percent). Answers related to dissatisfaction with the equipment included: "Don't enjoy using it" (32 percent); "Didn't see results" (18 percent) and "Wrong type of equipment" (15 percent). Only 5 percent says the equipment malfunctioned or broke.

• Among those who have owned and used their equipment for six months or more, however, 93 percent say they were achieving beneficial results; only 7 percent say they did not achieve any benefit. Better muscle tone was reported by 47 percent of this group and loss of weight or inches reported by 20 percent.

• The most-owned equipment was free weights, owned by 36 percent of owner-users, or 19.4 million adults. Second was treadmills, owned by 25 percent (13.6 million), then stationary bikes, owned by 23 percent (12.3 million). Among owner-users, 19 percent (10.3 million) own more than one type of equipment and 7 percent (3.8 million) own three or more.

• The leading sources of equipment are "stores like Sears or JC Penney's." Owner-users reported buying 25 percent of their equipment there. About 20 percent came from sporting goods stores. The third-most popular source, with 12.3 percent was secondhand, followed closely by "self-service stores like Wal-Mart and Target," with 11.8 percent.

• The average amount spent for any single piece of new equipment (not including secondhand purchases) by owner-users was $392. Treadmills fetched the highest average price, $699. Home gyms were next at $402, followed by cross-country ski machines, $394. The average spent for all new equipment by owner-users was $473.

• The decision to purchase home exercise equipment is highly personal. Asked, "Which one event or situation motivated you to purchase your equipment?" owner-users said 39 percent of their purchases grew out of a personal decision to improve health. The desire to lose weight was second, mentioned by 12 percent. Asked, "Which one person had the most influence on the purchase decision?" 38 percent said "myself." A family member was cited in 33 percent of the purchase decisions and a friend in 14 percent.

• Infomercials are powerful. "Saw it on TV" was the second-most cited outside influence, credited for helping to stimulate 17 percent of purchases by owner-users. The most important reason was previous use of similar equipment (cited by owner-users in 26 percent of purchases). "Recommended by friend or family member" was mentioned by 16 percent. Newspaper or magazine advertisements or articles were cited by 11 percent.

• About 7 percent of all respondents — representing 14 million adults — said they plan to purchase home exercise equipment in the future. Those most positive were current owner-users, with 11 percent planning to make another purchase. Among nonusers or former owners, 9 percent said they intended to buy, compared to only 4 percent of those who have never owned equipment.

Computer-assisted telephone interviews were completed with 1,607 adults to develop adequate samples of those who don't own home exercise equipment, those who own but don't use and those who own and use. The latter group consisted of 491 individuals. The survey has a confidence level of 95 percent with a margin of error of ±3 percent. For more information call 561-840-1161. More details on the results are available on the FPC Web site at www.sportlink.com/fitness.

Product & Service Update

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The Windows (95, NT, or 3.1x) CD-ROM of CensusCD+Maps provides:

- Estimates (1997) and projections (2002) of demographics (65 variables for each year) and consumer spending (32 product categories for each year) for five geographic levels (block group, tract, ZIP, county & state).

- 1990 Census (STF-3) demographics, over 3,400, for each of 375,000+ geographic units including block groups, tracts, and ZIP codes.

- Integrated Thematic Mapping with complete boundaries (from Tiger 95) down to block group geographic level. A built-in map viewer creates and displays thematic maps of .DBF files generated by the program. The process is seamless for the end user. Maps are customizable (themes, colors, ranges, scales, etc.) on the fly. A virtual variable calculator lets user perform mathematical functions (incl. Boolean) then automatically maps results. Viewer exports boundaries in ArcView and MapInfo, and maps as BMP. It thematically maps any imported .DBF file with an appropriate area key.

- County Time Series Statistics - 3,000+ variables in 26 categories for all 3,141 U.S. Counties. Data is from U.S. Govt. Agencies on topics such as federal spending (AFDC, SSI, grants, contracts, payroll, etc.), crime (FBI stats), agriculture, business (types, earnings, employment, payroll), banking, building permits, vital statistics (births, deaths, etc.) and more.

- Historical Census Counts (Total Population 1790 - 1990) by U.S. county.

- Geocoding of an address to its corresponding census block group to extract neighborhood information. Also allows for radius reporting around a specific address for any number of miles.

For more information call 800-577-6717, e-mail info@censuscd.com or visit the company's Web site at www.censuscd.com/cdmaps/censuscd_maps.htm.

Syndicated studies profile hard-to-reach markets

Greenfield Online, Westport, Conn., is offering In The Know, a series of syndicated marketing research studies to provide insights into traditionally hard-to-reach markets, starting with the college and lesbian/gay markets. The company will use its NetReach proprietary recruiting technique, to recruit low-incidence groups for the In The Know series. The series spans two areas: longitudinal studies specifically focused on meaningful market segments and vertical studies focused on specialty markets and category-driven issues. The studies will provide information on demographics, lifestyles, attitudes and purchasing dynamics, among other areas. For its first two studies, which will be available in July, Greenfield Online is partnering with two companies, Network Event Theater, Inc., a campus media and marketing company, and Spare Parts, Inc., a company specializing in lesbian/gay-focused consumer marketing. For more information call 888-291-9997 or visit the company's Web site at www.greenfieldcentral.com.

Raosoft updates EZSurvey

Raosoft, Inc., Seattle, has released Raosoft EZSurvey 98 for the Internet, version two of the 32-bit electronic collection program that lets users distribute questionnaires over the Internet, intranets, or any standard e-mail system. EZSurvey will also post a questionnaire on a Web site for easy answering. The program is designed for use with Windows 95 and Windows NT. The new version extends support to Lotus Notes, cc:Mail and Internet mail by POP3 and SMTP so that the user no longer needs to go through Microsoft Exchange to distribute the questionnaires. The questionnaires are sent out in text format. When the data returns, Raosoft Postmaster automatically saves the data into a DBF database file. Analysis and reports are available from EZSurvey itself, from the Raosoft SURVEYWin program, or from any DBF-standard reporting package. If ASCII format is desired, the data can be exported from SURVEYWin in fixed, tab-delimited, or comma-delimited format. For more information call 206-525-4025 or visit the company's Web site at www.raosoft.com/raosoft/.

Macro offers fragrance study

Macro International Inc., a New York research firm, is offering a new tracking survey for the fragrance industry, Consumer Intelligence—Fragrance. Macro will capture consumer response to 33 mass, prestige, and specialty fragrances, from a nationally representative sample of 1,500 women, including teens and prominent ethnic groups. The study is designed to provide data on current market trends, future buying patterns and opportunities, competitive strengths and weaknesses (as seen by consumers), and brand strength forecasts. For more information call Ilene Ritz at 212-941-5555, ext. 322.

Competitive intelligence Web site debuts

CISource, a new Web site devoted to competitive intelligence (CI), is now open at www.cisource.com. The site's contents include: best practices essays by CI practitioners and suppliers; descriptions of CI products and services, with hotlinks; a searchable listing of consultants, with hotlinks; information on CI-related books and periodicals; and listings of educational conferences and seminars.

NDS adds ZD's User Profile Data to its products

National Decision Systems, San Diego, has formed an ongoing license agreement with ZD Market Intelligence (formerly Computer Intelligence), a provider of sales and marketing solutions. The agreement allows NDS to offer the Technology User Profile Data from ZD Market Intelligence for use with NDS' consumer segmentation systems. The ZD Technology User Profile, conducted twice annually, focuses on personal computer, communications and home technology usage in the U.S. ZD Market Intelligence conducted an initial screening of 50,000 individuals to identify PC users in the home, workplace and self-employed markets. Survey results are based on a 12-page written questionnaire that was mailed to more than 17,500 U.S. PC users. The ZD Technology User Profile will be used in tandem with MicroVision, NDS' microgeographic consumer targeting system. For more information call 800-866-6510 or visit the company's Web site at http://natdecsys.com.

Readex introduces ad study

Readex, a Stillwater, Minn.-based research firm, has introduced On Target! as the fourth member of its ad readership study family. On Target! is designed to provide advertisers and agencies with a mini-diagnosis of how readers are reacting to their ad sales messages. The service delivers quantitative and qualitative feedback on how an ad performed. The key areas of the ad that are measured are: visual appeal, ease of reading, amount of information, clear communication of benefits, overall effectiveness, and verbatim comments relating to how readers feel about the ad. Advertisers and agencies can participate in an On Target! study at no charge by scheduling their ad in a sponsoring publication. For more information call Jack Semler at 800-8readex or visit the company's Web site at www.readexresearch.com.

Data Use

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immediately below for more on small correlation coefficients.

Why do performance items with higher means commonly seem less "important" than those with lower means in CSM studies where we find derived importance?

While this is not always the case, what you'll see as often as not is that items with higher variance are more correlated with the overall measure than those with lower variance. This is because of the whole idea of correlation having to with joint variation. Thus, a measure with low variance usually can't explain or account for as much variation in the criterion or overall measure as will one with a higher variance. Finally, then, an item on which the performance is universally high in the minds of respondents can't explain much variance in (or can't be strongly correlated with) the overall measure just because it (the item) doesn't vary. However, an item on which mean performance is so-so usually has a lot of individual variation (some respondents think you perform great, others think just the opposite, hence a middling mean) and, thus, can account for a lot of shared variation in the overall measure. Correlation is really non-directional and is looking at nothing other than shared variation, much as we'd like to imply a dependence relationship to it.

The same thing can occur when you correlate a lot of stated importance items with an overall measure. The higher the stated mean importance, the lower the correlation. Again, recognize that this is not a universal phenomenon, but something those of you doing lots of CSM work might want to chew on.

Some say never use individual respondent data in multiple correspondence analysis (MCA). Why?

Beats me, although it's undeniably easier to use a big crosstab table when doing an MCA than using the proper individual respondent data. In fact, without a lot of inventiveness there's no way that some data sets can even be put into an appropriate crosstab table prior to MCA. The major reason that one should use individual respondent level data is that you then see the effect of correlated answers in the resulting perceptual map. If the various categories (age, sex, BUMO, etc.) are truly statistically independent, then it's O.K. to use summary data for an MCA. Otherwise, be very careful.

Does respondent order really make a difference in segmentation studies?

This can be answered with an unequivocal, "maybe, maybe not." If you're using an older clustering program, you might see some differences in your segmentation results depending on the order of the respondent data. On the other hand, if you are using a newer program that does iterations (such as the k-means program found in PC-MDS and elsewhere) input order is pretty much immaterial. We've run several analyses where we've taken a data set, clustered it, randomized the order of the data, reclustered, and so on. The differences in the segments were so minor as to be negligible. They certainly weren't substantive. Using the data in the order collected probably works as well as any other order.

What is "card image" data?

This question really makes me feel old and I hear it frequently. It seems like only yesterday when data were input into a computer via a card reader. The card reader read information that was punched into cards, commonly called IBM-cards but more properly known as Hollerith cards (although Hollerith was one of the founders of IBM), which had 80 columns. Into each column we could put either a number, a letter or a special symbol by punching a small rectangle out of one or more of 12 possible positions down the column by using a machine with a keyboard similar to a typewriter (another archaic instrument). No wonder the cards were/are also sometimes called punch(ed) cards. These cards were also used to enter the computer programs. For the budget-conscious, one could correct errors in the cards by filling unwanted holes with a wax-like substance — less expensive but harder than just retyping the whole thing.

Anyway, in marketing research, then, card image data refers to data that consists of one or more "cards" of 80 columns per respondent. Of course, we can't call them cards since they aren't, so the new nomenclature is "records." Thus, a study using card-image data with five records per respondent means that we have up to 400 columns of data per respondent, arranged in blocks of 80 columns each. If we arranged this same data into one long record of 400 columns per respondent, then we have what some call string data, which is not the same as what some computer programs mean by the term "string data." In either case, the tough job is to tell the computer what can be found where so you can get the answers that you seek before the Friday afternoon deadline.

Also, you should note that while most programs used in marketing research data processing can handle card image data, data which are not card image cannot be analyzed by all of them.

By the way, punched cards were run through a card sorter, sorting/matching on particular punches in particular columns, as early versions of computer matching of potential dates (for social activities, not for calendars). Finally, an interesting item to put on a list for a scavenger hunt is a "punch card." Good luck finding one!

Any ideas for some readable reference material on statistical analysis?

Most anything that Jim Myers has ever published is well worth reading. His papers and books are very pragmatic, offer alternative viewpoints and make the reader think. I personally like materials that are not dogmatic and recognize that, particularly in marketing research, there may be two or more ways of looking at a particular type of analysis. (Jim also remembers what punched cards were, I'm sure.)

In our business, applications articles are interesting and sometimes directly useful. However, recognize that if a company or individual comes up with a truly unique way to solve a thorny data analysis problem it will probably never be shown to the general research community, instead remaining proprietary. That said, of course, not every technique that is put forth as proprietary is necessarily a unique problem solving tool.

The heavy duty technical articles and books are probably more cutting edge, but difficult for most of us to read and even harder to directly apply. This is not to say that they should be discontinued, but there may be a long time between the publication of such an article and when you can use it in an ATU study, say.

I enjoy the articles in columns such as this one, but the reader has to recognize that these papers are not peer reviewed and so may contain some things that are not 100 percent factual. That's O.K. as long as the reader doesn't take them as gospel, but notes that they are merely opinions about how to solve certain problems. You should also use a large salt shaker when pulling material from the Internet. I don't hesitate to ask others where to find information on such-and-such; you shouldn't either. There is no perfect source of information. ❑

Pfizer

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optimizes by choosing the tree structure with the lowest "misclassification cost," or probability that values are placed in the wrong categories.

"In ranking the relative importance of the IIEF's 15 items, CART was an indispensable tool because it evaluated all items simultaneously from a multivariate framework," says Dr. Cappelleri. "Within seconds, CART ranked the items according to how well they partitioned the outcome measure — ED or no ED."

Selecting the questions

Once Cappelleri was confident with his model, the next step was to evaluate if the top-ranking questions conformed to the NIH's definition of ED. Cappelleri and his Pfizer colleagues found firm agreement between the CART results and the NIH definition of ED. Such corroboration extended quantifiable support to the NIH definition and credence to the effectiveness of the CART results. The five specific items selected and their diagnostic evaluation are expected to be highlighted and discussed in an upcoming professional publication.

After selecting the questions, an easy-to-administer scoring system had to be developed. In this case, Cappelleri wanted to determine a cut-off point at which men scoring at that point or lower on the SHIM:IIEF-5 could be classified as having ED, while men scoring higher could be classified as having normal erectile functionality. In addition to CART, logistic regression was applied to help generate a receiver-operating characteristic curve that further supported the CART results. But the curve generated a series of possibilities, rather than a definitive cut-off point. Cappelleri then used CART to develop a scoring system to determine an objective SHIM:IIEF-5 score that gave a high level of sensitivity (high probability of correctly identifying ED) and specificity (high probability of correctly identifying men without ED). This scoring system is expected to be easy to administer and quick to calculate in a clinical setting.

Validating results

When the models were complete, Cappelleri used CART's cross-validation feature to ensure that the SHIM:IIEF-5 model would stand up to new, fresh data. For the cross-validation procedure, the software withholds a randomly chosen 10 percent of the data as a "test sample." The remaining 90 percent of the data, or the "learning sample," is used to generate a model, and the test sample is then dropped through the learning model to determine if the results are still valid. Users can change the number of times this validation process is completed, but, after CART's 10-model default, Cappelleri was confident that it convincingly corroborated the original results from the data. "We compared the misclassification table of the cross-validation results with that of the original results. These two misclassification tables were strikingly identical, giving the same values for both sensitivity and specificity."

Quality of life

Research on a diagnostic tool for ED was spurred by Pfizer's commitment to improving patients' quality of life, helping them live longer, healthier and more fulfilling lives. As a tool in the identification of such an under-diagnosed condition, the SHIM:IIEF-5 is a crucial part of the Outcomes Research Tools and marketing programs for Viagra. "At Pfizer, we recognize that one way to improve patient care is by developing and applying scientifically sound methods to help diagnose and treat conditions," Cappelleri says. "Proven analytical tools enhance our insight into data and help us make efficient use of our resources." ❑

References

[1] *Urology* 49:822-830 article: "The International Index of Erectile Function (IIEF): A Multidimensional Scale for Assessment of Erectile Dysfunction" by Raymond C. Rosen, Alan Riley, Gorm Wagner, Ian H. Osterloh, John Kirkpatrick and Avanish Mishra.

[2] NIH Consensus Development Panel on Impotence: published by the *Journal of the American Medical Association* 270:83-90, 1993.

DTC advertising

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drugs. In this regard, we hear physician comments such as "results in a more motivated, health-conscious patient," or "can create a more compliance-focused patient."

Now the issue that creates the delicate balance problem: While the physician is comfortable with a patient who has a point of view about treatment per se, he/she is generally less comfortable with advertising that speaks to a patient specifically about how to treat the condition. Understood through the physician's eye, this need takes the following form: The doctor does not want to become simply the executor of the patient's treatment requests. Specifically, requests that take the form of "how to treat" rather than simply a "desire to treat."

Without overstating the sensitivity of this issue, we have heard numerous physicians express the following grave misgivings about Rx DTC advertising. Comments include:

"It potentially results in our role going from determining what is best for the patient to one of having to debate with the patients about appropriate therapeutic modalities."

"It's great to have an informed patient, but let's be realistic — we are the ones who are best prepared to determine how to treat the patient — it is a waste of everybody's time to have a patient trying to take on the role of the doctor."

It is important to be clear about exactly what physicians' concerns are. Upon analysis, the issues being raised by physicians ultimately take the following form: While they are generally comfortable with a patient inquiring about the possibility of treatments for a particular condition, and even about a specific drug to treat the condition, they are not comfortable when patients enter their offices with an opinion about a drug's relevance, either per se or relative to competitive products.

Create awareness

Thus, the crux of the challenge for the pharmaceutical marketer is as follows: Among consumers, the marketer needs to create some awareness that a medical condition is treatable, and needs to create awareness that there is a drug worth asking the physician about relative to this medical condition. But, in the eyes of physicians, the marketer would be well advised not to create a strong point of view among consumers about "how to treat" the condition. And, to make this an even more challenging marketing communications issue, some would argue that the marketer should go beyond simply creating positive consumer associations with the drug (such as communicating specific benefits/differentiating features), while at the same time avoiding alienating physicians — a tall order, to be sure.

So, how are Rx DTC pharmaceutical marketers and their advertising agencies supposed to achieve this delicate balance. Well, a large part of the answer involves the fine art of copywriting. Here, we can offer little guidance, since this is an art, not a science, and far beyond the purview of marketing researchers. Where we can provide some guidance, however, is in helping clients employ research techniques that will provide creatives

> When developing marketing communications that must achieve the delicate balance, we have found it extremely helpful to go back and forth, and then back and forth again, between consumers and physicians.

with a deeper understanding of how consumers and physicians are responding to various pieces of communications. (Think of this as providing grist for the creative mill.)

To help marketers achieve the "delicate balance," we have found that qualitative research can be particularly useful. Below we have listed some general approaches along with some specific techniques that have proved helpful in developing marketing communications that motivate consumers and don't alienate physicians.

• Use an iterative approach: When developing marketing communications that must achieve the delicate balance, we have found it extremely helpful to go back and forth, and then back and forth again, between consumers and physicians. Within a qualitative context, this usually takes the form of presenting a "first take" on a piece of marketing communications directed to consumers, assessing their attitudinal and projected behavioral takeaway, and then exploring physicians' reactions to both the advertising and to consumers' response to the advertising. Then, based on physicians' comfort levels with consumers' responses, creatives have the option to then tweak the advertising if indicated. Then, we again present the new or tweaked advertising to consumers, again assess the attitudinal and projected behavioral response, and then assess physician comfort with the response. (Obviously, there are some situations which require little back and forth, and less tweaking is indicated.)

The relevance of an iterative approach involving a back and forth between consumer and physician flows from the very nature of trying to achieve a delicate balance between consumers attitudes and behavior (generated by advertising) and physicians' comfort with these attitudes and behaviors.

• Treating physicians as clients during the research process itself: While this may, on the surface, sound like heresy, it is actually an effective way of helping to achieve the delicate balance. Involving the physician in the development of Rx DTC marketing communications can work in a number of ways. Specifically:

• Recruiting physicians to sit in the back room watching consumer focus groups. In this situation, we often employ two moderators — one in the front room, and one in the back room. As consumers in the front room are responding to a specific piece of communication, doctors in the back room are responding to consumers' attitudes and projected behavior. This enables us to understand, in a very efficient manner, precisely where the potential problem areas (physician/consumer) lie in the marketing communications, how important they are, and, with a little input from creatives, how to address these issues.

A critical piece in this approach involves making certain that the initial qualitative effort with consumers is strongly focused on surfacing both the attitudes and projected behavior that result in exposure to the marketing communications being researched. In this area, we strongly recommend "flash" response techniques, which help surface reflexive and visceral takeaways from the advertising rather than intellectual interpretations. Use of flash techniques enables consumers to respond in a manner far closer to real world/in-market responses. The importance of getting to the reflex-

> As we know only too well, in the real world, consumers generally do not spend a great deal of time studying and thinking about advertising.

ive/visceral response — rather than intellectual response — cannot be overemphasized. As we know only too well, in the real world, consumers generally do not spend a great deal of time studying and thinking about advertising. As such, it is critical to make certain that whatever qualitative techniques you use during your consumer phase of research are sensitive to this.

• "House calls." This involves using pre-recruited pairs of physicians and consumers in the following manner: First, we expose consumers to Rx DTC advertising. Then, the physician enters the room to hear the patient's thoughts and questions that are generated by the advertising. Then, the physician is debriefed (after dismissing the consumer) regarding his/her comfort level with the consumer's response. Note: The "house calls" technique can be used either in a one-on-one situation or in a situation involving a group of consumers.

• On-site research. This involves showing marketing communications to patients in the physician's waiting room, and then debriefing the physician later in the day. This approach requires that the physician is willing to make very brief notes (after seeing each patient) regarding what kinds of questions surfaced, issues were raised, etc.

Looking to the future

In cases where there is a very low incidence of consumers who are targets for a particular drug, we are now using our database of Internet-user households as a vehicle for providing access to these hard-to-reach targets. This on-line capability allows us to assess the effectiveness of Rx DTC advertising at the patient/consumer level, including copy testing, compliance tracking, as well as measurement of ROI on DTC programs. We also use this medium to conduct on-line focus groups, enabling us to gain diagnostic insight with hard-to-reach targets.

The point of describing the techniques above is not to recommend any particular technique, but rather to illustrate that marketers and researchers have a relatively high degree of flexibility when it comes to involving consumers and physicians in research that is focused on achieving the delicate balance.

All indications are that Rx DTC advertising is here to stay, and will grow meaningfully for the foreseeable future. Pharmaceutical marketers (and their agencies) who understand that effective Rx DTC advertising must address the delicate balance issue, and who use research techniques to achieve this balance, will be the ones with the best chance of getting the greatest ROI on their marketing communications. ❑

Moderator MarketPlace

Listed below are names of companies specializing in qualitative research moderating. Included are contact personnel, addresses and phone numbers. Companies are listed alphabetically and are also classified by state and specialty for your convenience. Contact publisher for listing rates: Quirk's Marketing Research Review, P. O. Box 23536, Minneapolis, MN 55423. Phone 612-854-5101/ fax 612-854-8191.

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Pat Henry Market Research, Inc.
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InModeration
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Rhode Island
Performance Research

Tennessee
Directions Data Research

Texas
Cunningham Research Associates
Decision Analyst, Inc.
First Market Research Corp. (Heiman)

Utah
Valley Research, Inc.

Virginia
The Dominion Group Mktg. Rsch.
QS&A Research & Strategy

Washington
Burr Research/Reinvention Prevention
Consumer Opinion Services
Northwest Research Group, Inc.

SPECIALTY CROSS-INDEX OF MODERATORS

Refer to Preceding Pages For Address, Phone Number and Contact Name

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Cambridge Research, Inc.
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Dolobowsky Qual. Svcs., Inc.
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V & L Research and Cnsltg., Inc.

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Market Directions, Inc.

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Asian Marketing Communication Research
Asian Perspective, Inc.
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Erlich Transcultural Consultants

ASSOCIATIONS
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Market Directions, Inc.

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AutoPacific, Inc.
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Matrixx Marketing-Research Div.
Perception Research Services, Inc.

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Yarnell, Inc.

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Creative & Response Svces., Inc.

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Marketing Advantage Rsch. Cnslts.
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Horowitz Associates Inc.
Marketing Advantage Rsch. Cnslts.
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Strategy Research Corporation

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Strategic Focus, Inc.

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James Spanier Associates

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Cambridge Associates, Ltd.
Fader & Associates
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VETERINARY MEDICINE
Doane Marketing Research, Inc.

WEALTHY
The Deutsch Consultancy
Strategy Research Corporation

YOUTH
Fader & Associates
Macro International

Quirk's MARKETING RESEARCH Review

1998 Omnibus Research Directory

This directory was developed by mailing forms to firms we identified as providers of omnibus studies. The studies listed in this directory meet the following definition: An omnibus study is one in which the sponsoring research company defines the audience to be surveyed and the intervals between studies. Clients participate by submitting proprietary questions. Clients receive results only from their proprietary questions and general demographic questions.

Action Research
3 Baldwin Ave.
S. Burlington, VT 05403
Ph. 802-862-4370 or 800-545-7168
Fax 802-862-2349
E-mail: samo@actionr.com
http://www.actionr.com
Samuel P. Osborne, President
Studies:
VermonTrends™

Advertising Research Corp.
14 Commerce Dr.
Cranford, NJ 07016
Ph. 908-276-6300
Fax 908-276-1301
E-mail: arc@superlink.net
http://www.arcrescorp.com
Linda Tanaka
Studies:
Healthcare Purchase Process Among Consumers
Impact of Color in Yellow Page Ads
Business Communication Study
Yellow Pages in the Lawn & Garden Purchase Process
Yellow Page Font Size Study
Impact of White Knockout in the Yellow Pages
Yellow Pages in the Automotive Aftermarket
Yellow Pages in the Moving & Storage Industry

Angus Reid Group, Inc.
2929 Norwest Center
90 S. Seventh St.
Minneapolis, MN 55402
Ph. 612-904-6970
Fax 612-904-6980
http://www.angusreid.com
Eileen Wolford, Exec. V.P. U.S. Ops.
Studies:
Angus Reid USA Poll
Canadian National Angus Reid Poll

Audits & Surveys Worldwide
The Audits & Surveys Building
650 Avenue of the Americas
New York, NY 10011
Ph. 212-627-9700 or 800-274-3577
Fax 212-627-2034
E-mail: fwinkel@surveys.com
http://www.surveys.com
Barry M. Feinberg, Ph.D., Sr. Vice President
Studies:
IssueTrack®/USA
Tech/Track®

Behavior Research Center
1101 N. First St.
P.O. Box 13178
Phoenix, AZ 85002-3178
Ph. 602-258-4554
Fax 602-252-2729
E-mail: brc@primenet.com
http://www.primenet.com/~brc/
Earl de Berge, Research Director
Studies:
BusinessTRACK
ConsumerTRACK
HispanicTRACK
MetroTRACK

Beta Research Corp.
6400 Jericho Tpke.
Syosset, NY 11791
Ph. 516-935-3800
Fax 516-935-4092
Manny Mallo, President
Studies:
Beta Omnibus Exchange - Consumers
Beta Omnibus Exchange - Business Executives
Beta Omnibus Exchange - Healthcare/Physicians

Irwin Broh & Associates
1011 E. Touhy Ave.
Des Plaines, IL 60018
Ph. 847-297-7515
Fax 847-297-7847
Dave Waitz, Exec. Vice President
Studies:
Marcom

BRUSKIN GOLDRING
RESEARCH

Bruskin/Goldring Research
100 Metroplex Dr.
Edison, NJ 08817
Ph. 732-572-7300
Fax 732-572-7980
Irwin Korman, Exec. V.P., Operations
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OmniTel - Weekly national consumer study. For times when you need answers to a few marketing questions. It furnishes the same data quality as well-run dedicated surveys.
Integrated Survey Information System-ISIS - Weekly national consumer study. For custom surveys up to 15 minutes in length. It also furnishes the same data quality as well-run dedicated surveys.
(See advertisement on p. 3)

Bruzzone Research Co.
2515 Santa Clara Ave., Ste. 104
Alameda, CA 94501
Ph. 510-523-5505
Fax 510-523-5507
R. Paul Shellenberg, Dir. of Sales
Studies:
Super Bowl Advertising

California Retail Survey
5303 Nyoda Way
Carmichael, CA 95608
Ph. 916-486-9403
Fax 916-488-2407
E-mail: RHPJ47B@prodigy.com
James Vaughn, President
Studies:
California Retail Survey, 1997 Edition

CENTRIS

CENTRIS℠
10990 Rochester, #214
Los Angeles, CA 90024-6280
Ph. 877-7CENTRIS (Toll-Free)
Fax 310-543-2484
E-mail: CENTRISJK@aol.com
Jerilyn Kessel, Director
Studies:
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CENTRIS℠ is a daily targeted national telephone omnibus survey tracking over 60 communications, entertainment and technology areas in more than 1,000 random households weekly. Customized crosstabs available in seven business days or less. Accumulated database of 50,000+ households available for data extracts, custom incidence or analytical reports, or follow-up studies.
(See advertisement on p. 65)

CF Group Inc.
An NFO Worldwide Company
1075 Bay St.
Toronto, ON M5S 2X5
Canada
Ph. 416-924-5751
Fax 416-923-7085
E-mail: cf@cfgroup.ca
http://www.cfgroup.ca
Michael LoPresti, President
Studies:
Monitor
Multifacts
Multi-Q

CHILTON RESEARCH SERVICES

Chilton Research Services
201 King of Prussia Rd.
Radnor, PA 19089-0193
Ph. 610-964-4600 or 610-964-4694
Fax 610-964-2904/4016
E-mail: research@chilton.net
http://research.chilton.net
Roy Cooper, Express Business Manager
Studies:
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Chilton's EXPRESS Omnibus - Is a national weekly omnibus survey offering the highest quality research at the lowest price available. Designed to get the answers you need fast, EXPRESS allows you to submit questions as late as noon, Wednesday and to get full tabulations three business days later, on Monday. 1,000 adults interviewed. Nationwide RDD sample. Random respondent selection. Standard demographic banner.
(See advertisement on p. 66)

The Consumer Research Network, Inc.
3624 Market St.
Philadelphia, PA 19104
Ph. 215-235-2400 or 800-291-0100
Fax 215-235-6967
E-mail: consumernet@compuserve.com
Mona Doyle, President
Studies:
Packaging Audit - Food
Packaging Audit - HBC
Packaging Audit - Senior

Custom Research Inc.
10301 Wayzata Blvd.
P.O. Box 26695
Minneapolis, MN 55426
Ph. 612-542-0800
Fax 612-542-0864
E-mail: lpadersen@cresearch.com
http://www.cresearch.com
Lisa Padersen, Account Manager
Studies:
Criterion® Omnibus Concept Testing Sys.

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
Studies:
Multi-Quest®

Environmental Research Associates
279 Wall St.
Princeton, NJ 08540
Ph. 609-683-0187
Fax 609-683-8398
E-mail: era707@aol.com
Studies:
The Environmental Report
The Power of Children

Forum Canada Research, Inc.
14 Prince Arthur Ave., Ste. 200
Toronto, ON M5R 1A9
Canada
Ph. 416-960-9600
Fax 416-960-9602
E-mail: forum@pathcom.com
Studies:
National Consumer Omnibus

Gaither International, Inc.
G.P.O. Box 70211
San Juan, PR 00936
Puerto Rico
Ph. 787-728-5757
Fax 787-728-5715
E-mail: gaither@tld.net
Studies:
Purchasing Agent Omnibus
Representative Adult Omnibus

Greenfield Online
274 Riverside Ave.
Westport, CT 06880-4807
Ph. 203-221-0411
Fax 203-221-0386
E-mail: lisaparente@greenfieldgroup.com
http://www.greenfieldgroup.com
Steve Cook, Sr. Vice President
Studies:
Bi-monthly Online Omnibus

HealthFocus, Inc.
P.O. Box 7174
Des Moines, IA 50309-7174
Ph. 515-274-1307
Fax 515-274-3117
E-mail: HealthFoc@aol.com
http://www.healthfocus.net
Linda Gilbert, President
Studies:
HealthFocus Nation Study

I.S.I.S.-Integrated Strategic Information Services
2516 Hastings Dr.
Belmont, CA 94002
Ph. 650-802-8555
Fax 650-802-9555
E-mail: isis@isisglobal.com
http://www.isisglobal.com
Marc Limacher, Managing Director
Studies:
World Report 2000 - OECD Countrues
World Report 2000 - Emerging Economies
Telecom 2000 Report
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ICR/International Communications Research
605 W. State St.
Media, PA 19063
Ph. 610-565-9280
Fax 610-565-2369
E-mail: icr@mail.icrsurvey.com
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Steven C. McFadden, President
Studies:
EXCEL
TeenEXCEL

EXCEL - National telephone omnibus survey of 1,000 consumers conducted twice each week. Interviewing through final tabulations in seven days. RDD sampling; CATI interviewing; totally conducted in-house; custom options; extremely cost effective.
TeenEXCEL - National telephone omnibus survey of 500 teens aged 12 to 17. Conducted monthly. Interviewing through final tabulations within seven days. Same procedures and quality controls as EXCEL. Combine TeenEXCEL and EXCEL for 12 years+ population.
(See advertisement on p. 67, 69. 71)

IMR Research
140 Burlington
Clarendon Hills, IL 60514
Ph. 630-654-1077
Fax 630-654-1047
George Griffin, President
Studies:
Continuing Consumer Survey
Power Tools/Accessories/Home Improvement Survey
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Continuing Consumer Automotive Maintenance Survey

Innovative Marketing, Inc.
40 Eglinton Ave. E., Ste. 203
Toronto, ON M4P 3A2
Canada
Ph. 416-440-0310 ext. 31
Fax 416-440-1768
E-mail: imi@istar.ca
Don Mayo, Vice President
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Public Reach - Canada
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Van Nuys, CA 91406
Ph. 818-989-1044
Fax 818-782-1309
E-mail: mhalberstam@interviewingservice.com
http://www.interviewingservice.com
Michael Halberstam, President
Studies:
Solutions

Issues and Answers Network, Inc.
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Virginia Beach, VA 23462
Ph. 757-456-1100 or 516-487-8339
Fax 757-456-0377
E-mail: info@issans.com
Pamela J. Jenkins at 800-23-ISSUE
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Ph. 630-889-1900
Fax 630-889-0972
E-mail: promodata@leemis.com
http://www.leemis.com/lmc/
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Atlanta, GA 30339
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Fax 770-226-8899
E-mail: globadvan@aol.com
Ian MacFarlane, President
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Marketing Surveys for Industry
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Canada
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Fax 416-964-9333
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Classified Ads

Trade Talk

continued from p. 78

ing on their average price.

The second study of 140 consumers identified factors other than quality that influenced the size of the price premium consumers were willing to pay, across 20 grocery products.

Sethuraman and Cole found that perceived quality is the most important variable among the ones considered, though it accounts for only about 16 percent of the variations in price premiums across consumers and product categories. The researchers found that middle-income households were willing to pay smaller price premiums than high- or low-income households. Younger consumers were willing to pay larger price premiums than older consumers. And women would pay larger price premiums than men.

Consumers seem to be most price-conscious about product categories:

- in which the average purchase price is low;
- which are bought more often;
- which are staples rather than splurge items;
- in which the price-quality relationship isn't clear.

Enhance quality

Among its many suggestions, the report recommends that national brand managers work to enhance the perceived quality of their brands relative to the private label offerings and make sure consumers notice the quality by improving package design, advertising aggressively, and encouraging trial.

The influence of perceived quality depends on the product category. For commodity-type products, quality explains small amounts of the variation in price premiums. In categories where differences in perceived quality account for a large portion of the premium consumers are willing to pay for national brands, brand equity is a dominant factor. In these cases, the authors recommend brand managers increase objective quality through product improvements and then use advertising to educate consumers.

The authors caution that their findings are based on self-reported behavior, and that consumers' intentions may not match their actual behavior. Alas, that is the subject for another study. ❑

Why Do Consumers Pay More for National Brands than for Store Brands? *(No. 97-126) is available from Marketing Science Institute (617-491-2060 or pubs@msi.org).*

Listing Additions

Please add the following firm to the 1998 Telephone Interviewing Directory:

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1603 Lincolnway, Ste. A
Valparaiso, IN 46383
Ph. 219-464-4668
Fax 219-464-7011
Kathy DeWitt, President
10-10-10-10

Index of Advertisers

Trade Talk

By Joseph Rydholm/QMRR editor

Study examines choices between national brands, private labels

For many food marketers, the rise of private labels and store brands has been a bane. It's hard enough to get people to buy your product but it's even harder when there's a generic equivalent that's cheaper and, arguably, of the same quality. Whether it's saltines, soup, or soda, a good portion of the consuming public doesn't care who makes it, as long as it's cheap and it tastes all right. And as private labels have succeeded in some product areas, they have infiltrated others. Where will it end? In each case, it depends on how well marketers can convince consumers that their trusted, tested brand is superior to some no-name equivalent.

Farcus

by David Waisglass
Gordon Coulthart

"We must be on a mailing list."

After conducting research to investigate how consumers say they would behave when faced with the national brand/store brand question, Raj Sethuraman and Catherine Cole have authored a report for the Marketing Science Institute, a Cambridge, Mass., organization that sponsors studies on a wide range of marketing issues. Sethuraman is assistant professor in the marketing department at the Cox School of Business, Southern Methodist University. Cole is associate professor in the marketing department at the College of Business Administration, University of Iowa.

For their report, *Why Do Consumers Pay More for National Brands than for Store Brands?*, Sethuraman and Cole used two consumer studies to collect data on the premiums consumers say they would pay for products in various categories.

In the first study, 203 consumers were surveyed to find out more about the relationship between perceived quality and price for national brands in 88 product categories. Using a seven-point, unbalanced scale, consumers responded to the following request: "Please indicate your opinion about the quality of private labels when compared with the quality of national brands for each product category." To gauge price differential, consumers responded to a sample scenario such as this: "In the following product categories, suppose the national brand price is 99 cents. At what price would you be willing to buy a private label brand instead of the national brand?" In the case of this product category, respondents could choose from prices on a scale that descended in nine-cent increments from $1.19 to 0. Other product categories used similar scales and ranges, depend-

continued on p. 77

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Excellent! Best professional seminar I've been to. Content was practically oriented. Speaker excellent! Presented information in an extremely "user friendly" manner. Energy level was phenomenal.
Manager, Marketing Research, **Bausch & Lomb**

This seminar has been more useful than any other coursework I've completed. This was worth more than the $ my company spent to send me. Very comprehensive — everything I needed.
Assistant Manager, Marketing Research, **Riverside Methodist Hospital**

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101. Practical Marketing Research $1,600
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- Atlanta . . . . June 15-17
- New York . . . . June 29-July 1
- New Orleans . . . . July 20-22
- Cincinnati . . . . Aug. 10-12
- San Diego . . . . Aug. 31-Sept. 2
- Chicago . . . . Sept. 21-23
- Boston . . . . Oct. 12-14
- New York . . . . Nov. 2-4
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103. Marketing Research for Decision Makers $1,200
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105. Questionnaire Design $1,200
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