



QUIRK'S

Marketing Research Review

Volume XIII, Number 2

February 1999

Building successful customer surveys

Software reviews

- SPSS 9.0
- Systat 8.0
- AnswerTree 2.0
- DeltaGraph 4.0

1999 Data Processing/Statistical Analysis/Software Directory



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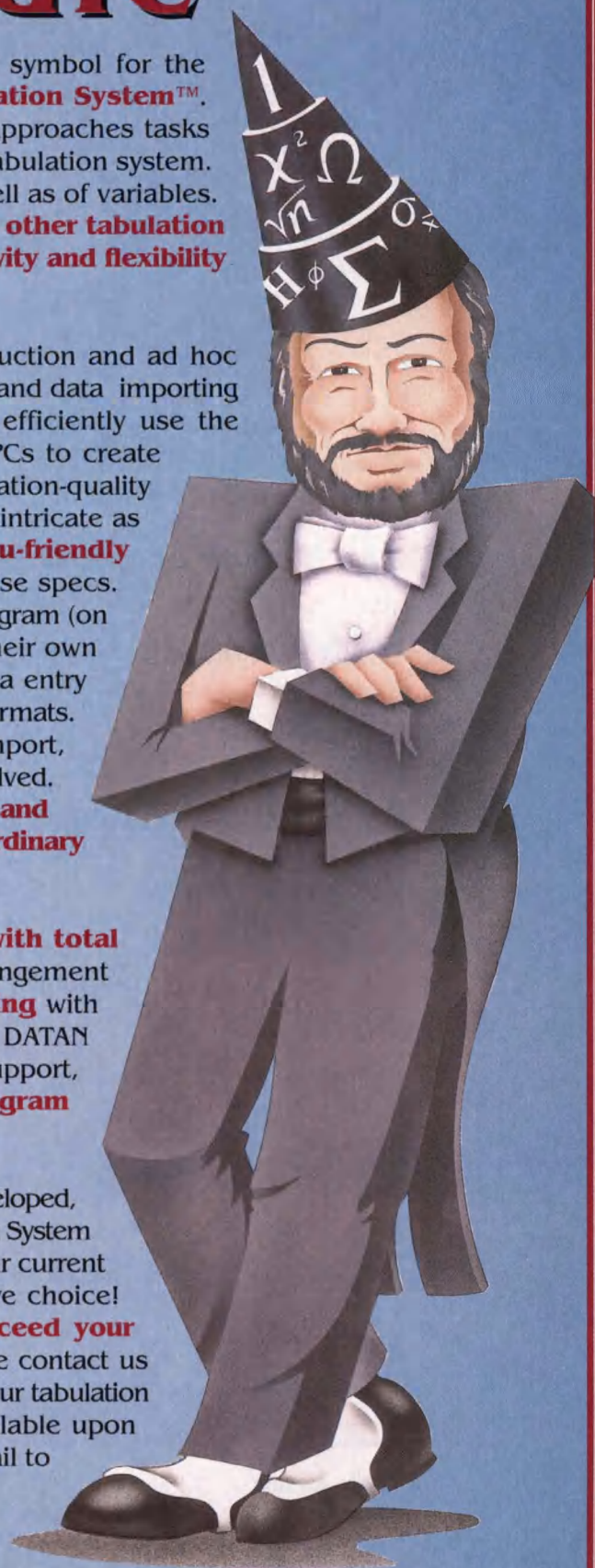
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QUIRK'S

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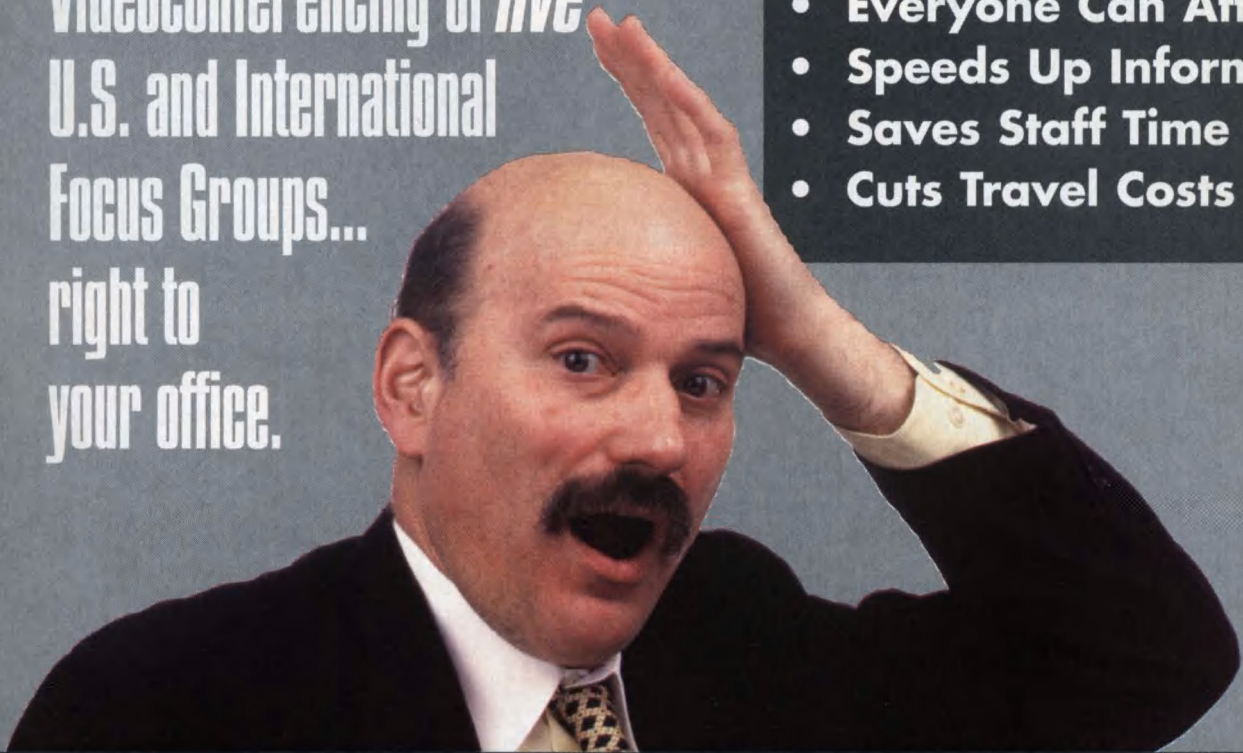


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Shanghai, China

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LATIN AMERICA

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* CPM Market Research

* Demanda

* EP Escritorio de Pesquisa

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Mexico City, Mexico

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Be my valentine or else

According to a Maritz AmeriPoll, conducted by St. Louis-based Maritz Marketing Research, over three-fourths of Americans (77 percent) give cards and gifts on Valentine's Day. Despite February 14th's popularity, 65 percent of us don't know why the day is called Valentine's Day.

The higher your income, the more likely you are to give, and if you consider yourself a romantic (as do 65 percent of people) you're also more likely to participate in the love-fest.



In fact, 86 percent of romantic women and 80 percent of romantic men give gifts and cards.

So, to whom are we giving all this love and attention? Spouses, children and parents top the list, followed by girlfriends/boyfriends. Who's last? Who else: your boss.

Men be forewarned. In general, 72 percent of women expect to receive a card or gift for Valentine's Day. Forgetful ladies have a better chance of surviving the weekend though — only 59 percent of men expect something.

The average amount of money spent for cards and gifts varies by whether you're a man or a woman. Men spend an average of \$47.49, or \$16.07 more, on cards and gifts than women. Women spend an average of \$31.42. It's even worse for romantic men, who pay \$50.35, or \$18.11 more, for cards and gifts than their counterparts.

Over 72 percent of Americans celebrate Valentine's Day. If you need some ideas, here are the top five ways to make it special:

- Go out to eat 38 percent
- Give chocolate or candy 20 percent
- Send flowers 18 percent
- Have a romantic dinner at home 12 percent
- See a movie, play or concert 10 percent

Other ways include a romantic getaway (5 percent), giving lingerie (3 percent), or proposing marriage (1 percent). But if none of this turns you on, you're not alone. Twenty-eight percent of Americans do nothing at all to celebrate Valentine's Day. For more information call 800-446-1690 or visit the AmeriPoll Web site at www.ameripoll.maritz.com.

AOL megadeal faces user acceptance challenge

The acquisition of Netscape by AOL means that one out of three U.S. adults who go on-line monthly or more often will soon start their on-line sessions by opening a page owned by America Online, according to research released by Cyber Dialogue, a New York-based

continued on p. 48

Have fun, will travel

More Americans than ever will travel in the coming year for pleasure and business, according to a survey from Wirthlin Worldwide, a Grand Rapids, Mich., research firm. Seventy-six percent of respondents plan a leisure trip of 200 miles or more in the next 12 months — and most plan more than one. This may be yet another indicator that Americans are more confident in their finances than they have been in a generation. The fastest-growing source for planning travel is the Internet; more people under age 55 look to the Net than to travel agents for information. Web users bargain-shop and find firsthand reports on destination offerings from fellow travelers, though only 10 percent have booked lodging and only 11 percent have booked transportation on-line.

Transportation disasters and reports of substandard safety and maintenance practices seem to have at least a short-term effect on vacation planning. Before late-July 1998 reports of a fire on a large cruise ship near Florida, 14 percent planned a cruise vacation; afterwards, only seven percent said they'd stay on a ship. Half of Americans say they are more concerned (26 percent much more concerned) about airline safety now than in the past. Still, 53 percent of Americans — 81 percent of those with \$60,000-plus incomes — say they will fly to a vacation spot.



Those who worry most about airline safety (women aged 18 to 24, people with less income and education, and travelers who live in the South) are the least likely to fly for pleasure travel. The family vehicle remains the vacation transportation of choice for the vast majority (86 percent) of Americans, especially those with children and those with smaller household incomes.

Anticipated business travel over 200 miles is up seven percent from two years ago, with the sharpest increase among women. Some 43 percent of American men and 25 percent of women expect to travel for business in the next 12 months. Men make up nearly two-thirds of business travelers, and average more than eight trips planned in the coming year, while women average just over five. For more information, access The Wirthlin Report on the Web at www.wirthlin.com/publicns/library.htm or call 616-954-0200.

Money does grow on trees

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

Response to promotion

Number of visits before promotion
> 4,500 <= 4,500

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

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

Spending before promotion

> 97,505

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

<= 97,505

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

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New Internet research tool

After a test launch in Germany, the Internet Rogator Market Research Survey Tool is now available in the U.S. Developed by Heidingsfelder-Gruppe in Germany and offered by MM Designs Inc., Big Rapids, Mich., the Internet Rogator is a multifunc-

tional Internet market research instrument. Programmed in UNIX, it is controlled through HTML pages in order to avoid the safety gaps associated with Java, ActiveX and similar applications. The product is offered in four configurations: bronze, silver, gold and platinum. The free bronze introductory survey includes ad banners, a maximum of five questions (simple answer only), and one-month maxi-

mum exposure. For more information, and to build your own interactive survey, visit the Rogator Web site at www.internet-rogorator.com.

Updated flowchart package from SPSS

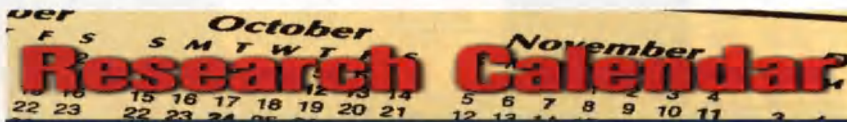
SPSS has released allCLEAR 4.5, a flowcharting package designed to help users create and revise process diagrams and organizational and deployment flowcharts without using a mouse. The upgrade builds on allCLEAR's "text-to-flowchart" capability and gives users a way to draw flowcharts by typing in simple words and phrases. New features include advanced logic commands and a Web wizard. For more information call 800-543-5815 or visit the allCLEAR Web site at www.spss.com/software/allCLEAR.

Oakdale enhances curve fitting software

Oakdale Engineering, an Oakdale, Pa., software firm, is now shipping DataFit 6.0, a software tool used to perform nonlinear regression (curve fitting) and statistical analysis. DataFit is designed to determine whether or not a relationship exists between two or more variables, describe the nature of the relationship in the form of a mathematical equation, and then assess the degree of accuracy of prediction achieved by the equation.

The software can be used in a wide range of applications such as determining the relationship between crime rate and various economic and social conditions, or between life insurance premiums and health risk factors. DataFit automatically determines the optimal parameter values for selected pre-defined and user-defined regression equations and sorts them according to how well they describe the sampled data, providing a best fit curve through the sampled data points.

The latest version 6.0 now contains



SATISFACTION AND QUALITY MEASUREMENT CONFERENCE: The American Marketing Association will hold a conference on customer satisfaction and quality measurement from February 28 to March 2 at the Disneyland Resort in Anaheim, Calif. For more information call 312-648-0536 or visit the organization's Web site at www.ama.org.

SENSORY EVALUATION WORKSHOP: As part of its workshop series "Issues in Sensory Evaluation," Tragon Corporation will hold a workshop entitled Principles of Sensory Evaluation on March 1-3 at the Sheraton Palo Alto, Palo Alto, Calif. The workshop will focus on screening and selection of subjects, description of test procedures, consumer testing guidelines, optimization techniques, and statistical analysis and interpretation of results. For more information call 650-365-1833 or visit the company's Web site at www.tragon.com.

ESOMAR CONFERENCE: On March 3-5, the European Society for Opinion and Marketing Research (ESOMAR) will hold a conference titled "Market and Competitive Intelligence: Understanding the Impact" at the Hotel Intercontinental in Geneva, Switzerland. For more information visit the ESOMAR Web site at www.esomar.nl.

SAWTOOTH TECHNOLOGIES SEMINARS: Sawtooth Technologies will hold the following seminars near the company's offices in Evanston, Ill.: conjoint analysis: theory and practice, March 8-9; introduction to ACA & Sensus TradeOff, March 10; introduction to choice-based conjoint, March 11. The seminars are designed for researchers who have had little or no practical exposure to the techniques. With the exception of the one-day introduction to ACA/Sensus TradeOff, the classes are not training classes for Sawtooth Technologies products. Topics covered include: study design, sampling, analysis and presentation of results; case studies are also presented. Discounts are available for three or more attendees from the same company. For information on fees and registration call 847-866-0870 or visit the company's Web site at www.sawtooth.com.

ARF CONFERENCE: The Advertising Research Foundation will hold its annual conference, themed "Accountability Now," and expo on March 15-17 at the New York Hilton. For more information call 212-751-5656 or visit the organization's Web site at www.arfsite.org.

over 350 pre-defined regression equations commonly used in statistical and engineering applications, making it easier to find the best curve to describe a collection of data. Users can also define their own regression equations which, in the new version, can contain up to 100 fitting parameters. The software can now also handle datasets containing up to 20 independent variables. Other enhancements include: enhanced data editing and manipulation features; multiple-level "undo" capability; improved file importing capability and improved source code export.

Results obtained from the software include customizable, presentation-quality plots of the sampled data, regression equations, residuals and residual probability. Also provided are the fitted model parameters and confidence intervals, sampled versus estimated data, error tables and regression goodness-of-fit statistics. DataFit can also automatically produce C or BASIC program code representing the solved regression equations, letting

users incorporate them within their own computer programs. For more information and a free 30-day evaluation copy, visit the company's Web site at www.oakdaleengr.com.

Guide to tech info sources

Washington Researchers, Rockville, Md., has released the fifth edition of "Technology Opportunities: Researching Emerging & Critical Technologies," a resource guide to technology information sources, including federal government departments and agencies that have specific R&D activities in telecommunications, pharmaceuticals or environmental technologies. The new edition also includes international sources, including government offices in 35 countries that have responsibility for tracking science and technology policy, and international organizations and associations such as the International Federation of Associations for the Advancement of Science and

Technology. For more information call 301-251-9550.

Site focuses on Canadian demographics

Interested in Canadian demographics? Take a quick quiz on the Internet at the FP Markets - Canadian Demographics Web site (www.fpmarkets.com), sponsored by Canada's *Financial Post*. The Q&A's come complete with data showing what percentage of quiz participants give the right answers. Visitors can also try a demo of a CD-ROM on Canadian demographics that puts data searching, detailed facts, figures and graphical analysis options at their fingertips.

StatSoft releases STATISTICA line for '99

StatSoft, Inc., a developer of statistics and graphing software, has released the STATISTICA'99 edition of its software products. The '99 line

continued on p. 52

diverse It's a ~~small~~ world...

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Curtis P. Johnson has joined St. Louis-based *Quality Controlled Services*' (QCS) client service office as an account representative. He will be based in Philadelphia. In addition, **Kim Reale** has joined QCS as a client services representative. She will be based in St. Louis.

Lynda Sanders has joined *Eagle Research* as sales, marketing & advertising account executive in the Denver office. In addition, **Steven McDonald** has joined the Atlanta office of Eagle Research as supervisor/facilities coordinator.

Boise, Idaho-based *Clearwater Research* has announced a number of hirings and promotions. In the Boise office, **Craig King** has been promoted to assistant study director; **Jamie**

Holloway and **Laura Botimer** to data collection project coordinators; **Margie Olson** to data collection senior supervisor; and **Sandra Snediker** and **Rebecca Needles** to data collection project technical assistants. New hires at the Boise office include **Heidi Aldous** as research technical assistant, **Sandra Lowe** as data collection project coordinator, and **David Hoffman** as programmer. In the firm's Council, Idaho, office, **Kathy Merritt** as been promoted to senior supervisor.

Jill Wynn has joined *Taylor Nelson Sofres Intersearch*, White Plains, N.Y., as senior vice president and head of the telecommunications business practice in the U.S.

RONIN Corporation has

announced several appointments to its staffs in its Princeton and London offices. In Princeton, **Anu Bhalla** has been named vice president, research services; **Kate Feather** has been named senior research director; and **Stacianne Wright** has been named research manager. In London, **Umma Kahn**, **Rafal Gajamowicz** and **Paul Donagher** have joined the research staff. And **Graeme Griffiths** has been promoted to the research staff and **Simon Winter** has been promoted to *RONIN Technologies* as technical consultant.

At *Harshaw Research Inc.*, Ottawa, Kan., **Dale Ream** has been



Ream

Brundage

promoted to vice president/general counsel and **Thomas Brundage** has been promoted to vice president/research & development.

Michael Ephron has been named account director at *Roper Starch Worldwide*, New York.

Knowledge Systems & Research, Syracuse, N.Y., has promoted **Jeffery Horst** to senior research associate and add **Kristin Fischer** as research analyst.

Charlene Trimmer has joined *Information Resources, Inc.*, Chicago, as executive vice president for sales solutions.

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ACNielsen Corp., Stamford, Conn., has launched a TV ratings service in Beijing. The launch of the Beijing Peoplemeter panel follows launches in Shanghai in 1997 and Guangzhou in 1998.

In separate news, the firm has won a three-year contract with the Federation of Australian Radio Broadcasters to measure the audience for the \$330 million radio industry in Australia.

NFO Worldwide, Inc., Greenwich, Conn., has acquired Europe-based Infratest Burke. The total cost of the acquisition, including the assumption of pre-existing debt, was approximately \$151 million.

SPSS Inc., Chicago, has pur-

chased U.K.-based Integral Solutions Ltd., a data mining company, for \$7.1 million in cash.

Separately, SPSS has formed a distribution agreement with McGraw-Hill textbooks to include SPSS 8.0 Windows Student Version software with data sets that correspond to specific exercises within certain textbooks.

Survey Sampling, Inc., Fairfield, Conn., is offering a list of recent ZIP code realignments. To request a copy of the list, send an e-mail to info@ssisamples.com.

Telmar Group, a New York supplier of advertising media planning software, has acquired a majority interest in Toronto-based Harris

Media Systems Ltd., a media planning software and services company.

DataStar, Inc., a Waltham, Mass., data processing firm, has made a \$1,000 donation in the name of its clients and friends to the Central American emergency relief efforts of the American Red Cross in the aftermath of Hurricane Mitch.

ICT Group, a Langhorne, Pa., call center services firm, has been awarded ISO 9002 quality certification.

FH&K Ideas That Deliver, a Neenah, Wis., a business-to-business marketing firm, has acquired Leading Questions, Inc., a lead qualification and management company that also offers telephone research services.

Compass Marketing Research, Norcross, Ga., has opened a telephone survey center in downtown Athens, Ga. The facility houses 30 computer-assisted interviewing stations and will employ 40-50 people.

Wilkins Research Services, Chattanooga, Tenn., has opened a new 7,000-sq.-ft. facility at 1730 Gunbarrel Rd. The facility includes three focus group rooms which may be combined to form one large, 69 x 49-sq.-ft. room.

U.K.-based **Pulse Train Technology** has been working with U.K.-based ISPC to establish a link between Pulse Train's STAR for Windows batch tabulation package and ISPC's ITE electronic fiche product. The improved compatibility between the two products allows STAR users to transfer their tabulation output file into a compressed electronic form for archiving or dis-

continued on p. 67

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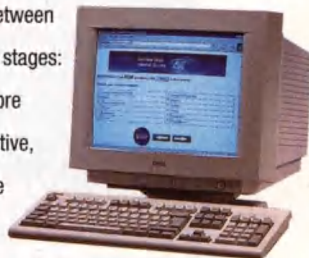
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War Stories

True-life tales in marketing research

By Art Shulman

Editor's note: "War Stories" is a regular feature in which Art Shulman, president of Shulman Research, Van Nuys, Calif., presents humorous stories of life in the research trenches. He can be reached at 818-782-4252 or at artshulman@aol.com.

Moderator Paul Schneller was pleased to see that a Florida focus group facility was giving written instructions to its recruiters. But he was a little taken aback when he read, "In recruiting, you will be screening to obtain 12 women per group who are automatic dishwashers on a regular basis."

Jake McHugh of Ameritas Life Insurance conducts an annual satisfaction study among members of the dental plan his company provides. This past year they included a dollar bill as an incentive, together with a note reading, "At your next coffee break enjoy a beverage on us." One respondent sent back a completed questionnaire along with the dollar bill and a note saying, "I'm now retired and no longer have a coffee break. So I'm returning the dollar."

Is there such a thing as too much honesty?

Recently we worked on a toy survey conducted in several European countries. The questionnaire had to be translated into several languages. When the versions came back from each country for approval, we noticed that the version to be used in England was changed in one way from the U.S. version. Our original questionnaire asked for the "Mom's Name." In the England version of the questionnaire, interviewers were to write in the "Mum's

Name." Also, when we received the completed questionnaires from England we learned that apparently in England there are no "bad guys." Rather, kids refer to the villains as "baddies."

Alice Strauss of Interviewing Service of America tells about her early days as a door-to-door interviewer. One day, while wearing a minidress, she knocked on the door of an elderly man and asked if she could interview him. He replied, "I'll give you the interview if you let me look at your legs." Strauss mulled over his proposal. Incidence was low, production had been low, and the day was drawing to a close. So she said, "OK, as long as you stay on your side of the room and I stay on the other side." Strauss reports that it was a pretty big room.

Larry Sherman, who'd recently been hired as director of research at Sanwa Bank, reports that he was at an interdepartmental meeting. A senior executive from another department, who'd only recently met Sherman, was chairing the meeting and introduced him as Larry Sanders, the same name as the main character on comedian Gary Shandling's HBO show.

Sherman was sitting next to the director of human resources, whom he knew fairly well. After the two of them exchanged glances to acknowledge the name mix-up, Sherman asked the HR director if she would officially change his name in the records. "Next thing you know you'll be asking me for his level of compensation," she said.

"That was my next question," Sherman replied.

Mark Snowden is a media strategist for a large Christian missions organi-

zation. He tells about participating on a team conducting a media preference survey across the Americas that included several Indian groups. They were really pleased with the response, netting more than 6,000 surveys. However, when they received the 100 completed questionnaires from the K'ekchi in Guatemala they quickly noticed that they were all filled out identically! At first they suspected tampering by a leader or a missionary, but each form (translated into K'ekchi) had been meticulously completed by a different person who boldly signed his or her name at the end. Later, his team determined that the ancient Mayan custom still lingered — for a group consensus to be reached on every question, even in a questionnaire. And, yes, his team included each of the 100 completed questionnaires in their survey results.

Doug Conwell of the *Tampa Tribune* tells about a survey conducted for a local hospital. A 17-year-old male interviewer, very new to surveying, indicated that a respondent traveled out of her area to visit her "dina-cologist," followed by a string of question marks.

Another entry for the "Where do we find these interviewers?" file.

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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By Steven Struhl

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

Software has reached unprecedented levels of product proliferation. Just as we start to know what a software program really can do and what its bugs are, out comes an updated version with its own new capabilities and failings.

Software companies, as a group, definitely have become more clever. They keep the development engines turning at full speed, and keep announcing that they have the latest thing, and then the latest, latest thing — and so forth. Then they just need to wait for the poor user to feel hopelessly out-of-date. Of course, some hearty souls will keep running software, especially business-related software, that is a version or two behind the newest. But I have met few capable of standing the heat after they fall three or more versions behind.

The result: users buy upgrades, and the software company has a nice, steady stream of revenue.

Now of course, this is just a theory, so all you software manufacturers don't need to "flame" me (or, send me hate mail, as we used to call it in the old days).

Whatever the cause, there is an amazing amount of software available to learn about, let alone review in some coherent fashion. What started as a review of the new SYSTAT product began to seem inadequate as all these other products (SPSS 9.0, AnswerTree 2.0, etc.) hit the market.

For this review, we're going to make the rash assumption that our readers understand something about SPSS and what it does. We direct any reader who is resolutely plowing into this review in spite of feeling uncertain about what we are reviewing to look at the sidebar discussion, "Statistical programs vs. the spreadsheets."

SPSS history and the new release's place in the great chain of updates

By the time you read this, SPSS Version 9.0 will have been released. When we last reviewed SPSS in 1997 it had just emerged as Version 7.5. That update in turn had followed quickly after Version 7.0, which marked a major

change for the program.

With this earlier (7.0) release, SPSS had made its most dramatic move away from the typewriter-style output that was then standard for statistics programs. With the new SPSS, many tables and other types of results appeared as "Windows objects," and looked good enough to grace any scientific or technical journal. The output used nice proportional type and offered a variety of fancy formats that you could apply, just as you could in a major spreadsheet such as Excel.

With 7.0, SPSS finally gave you a way to find your place in a long string of output. It did this via a feature called the "output navigator," which replaced the sometimes endless-seeming unmarked string of text output that SPSS and all other statistics programs once generated. It also did away with something called a "chart carousel" — which was not the fun ride that its name implied — to the cheers of appreciative users everywhere.

The navigator organized all the types of output that SPSS could produce. Small "books" went into an organized tree-like display window to the left of the display screen, with each book containing all the output from one procedure or method that you ran on your data. Fig. 1 shows you a small section of some SPSS output as it appeared in the navigator. In this, you can see a series of small books to the left and the actual output corresponding to one of those books on the right.

You could scroll down in the left-side window to any book, and so go quickly to the exact portion of the analysis that you needed. The navigator allowed you to label these books yourself, or simply to leave the program's own non-specific labels (such as "descriptives," or "analysis of variance"). The left window in Fig. 1 includes some output that has had descriptive names added in the left-hand window.

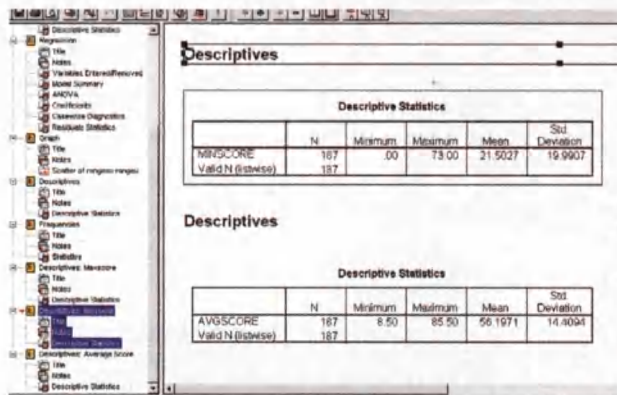


Fig. 1: SPSS output, as it appeared in the output navigator.

This output even has the flexibility to allow you to move sections of the analysis by dragging the books to different spots in the tree display. You either can edit the output on the spot — which admittedly at times is not that simple in the SPSS format — or save the output to revise later.

Perhaps most important, starting with the version 7.0 series, you also could copy and paste all or any part of the output into Windows-based word processing, spreadsheet, and presentation packages. You had (and have) several

continued on p. 57



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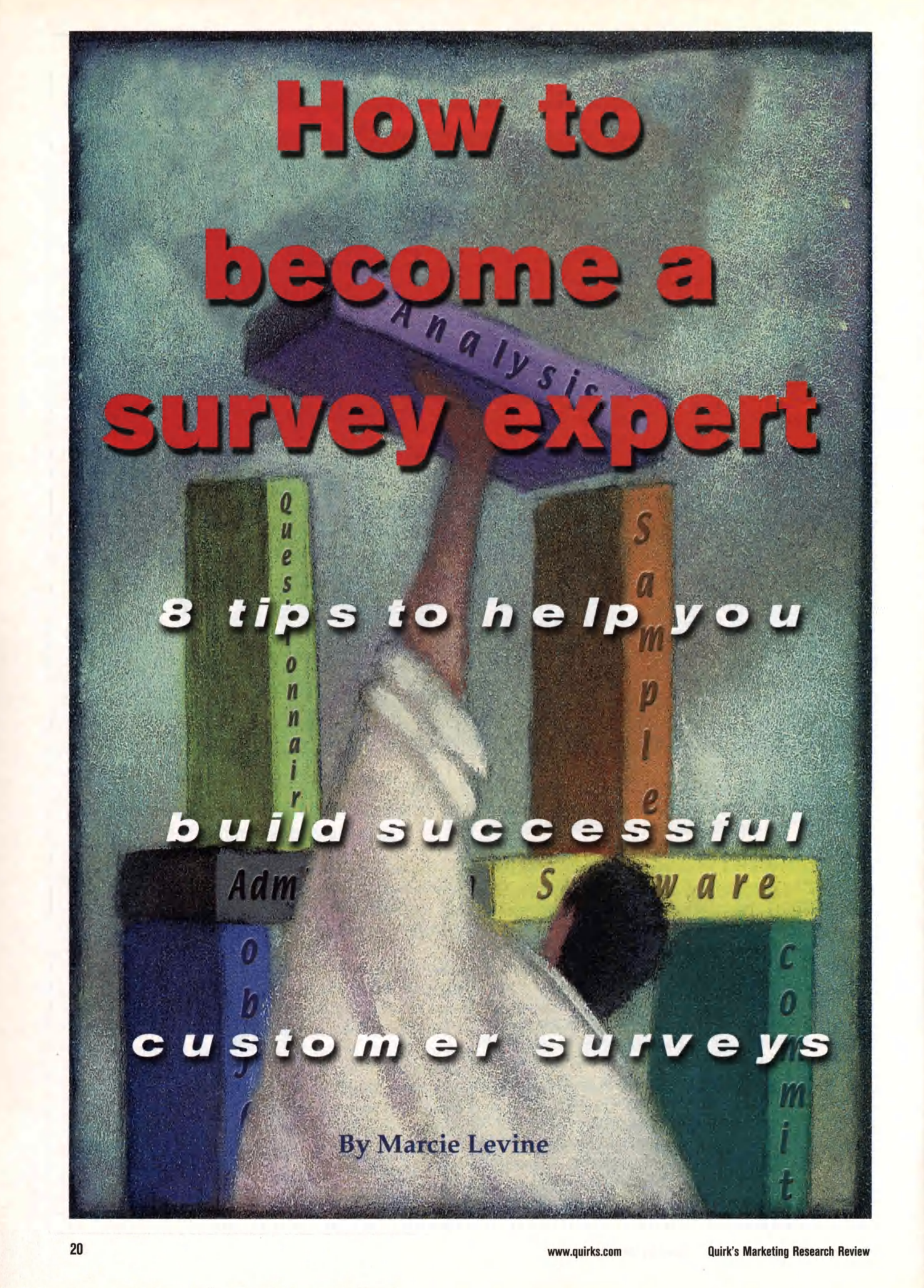
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How to become a survey expert

8 tips to help you

build successful

customer surveys

By Marcie Levine

Editor's note: Marcie Levine is president of Saja Software, Inc., a Longmont, Colo., producer of survey software. She can be reached at 800-945-0040 or at mlevine@surveyselect.com.

Let's say your CEO or boss has just returned from a conference emphasizing the importance of gathering information in today's competitive business arena. One case study that has been brought to their attention highlights a company that improved sales by making product decisions based upon research from existing and potential customers through a series of opinion surveys on their Web site. In fact, your boss has now decided it would be a great idea to survey current customers about a newly launched product. Before you know it, you find yourself responsible for this fantastic and exciting new project. There's only one small problem: You've never created a survey and have no idea where to begin. It may seem overwhelming at first, but by following these eight steps you can be well on your way to becoming a survey expert.

Step #1: determine the objectives

It is important to pin down the objectives before beginning the survey process, because they are the reference points that guide the survey. Your objectives will influence the number of questions while shaping content and administration. Some questions to ask that will help determine the objectives of the survey include:

- Why is this survey being done? What problem needs solving?
- What information does the person requesting the survey need to know?
- How will the response data be put to use?

When making decisions on the target audience, the demographic ques-

tions, and the survey structure, you can return to the statement of objectives to ensure that what is being asked will achieve the desired result.

Step #2: obtain corporate commitment

Your department will probably use the information from your survey to change or shape programs, products or services and even creative approaches. To produce the right kind of data that will help steer these decisions, it's crucial to make sure that the people who requested the survey are committed to, and involved in, the survey process.

You need to write a plan that includes key actions, dates, roles and responsibilities, as well as other resources needed to administer and communicate the survey's results. The chances of a successful survey are reduced unless you have clearly communicated the plan to the people involved.

Step #3: identify and know how to contact customers (the target audience)

When identifying customers and determining how to reach them, some useful questions to ask are:

- How big is the potential customer base?
- Will all the customers be surveyed, or only a portion of the market?
- If only a portion of the customers will be surveyed, will you survey a random sample of the group or a specific subset of the group?
- Who is responsible for providing or obtaining the names and addresses of the customers, if names are required?
- What demographic data will be needed?

The answers to these questions will help you develop a mail, phone number or e-mail list. It will also help determine the first communication vehicle for you - a memo, an e-mail, a

letter to the customer's home, or a phone call. Depending on who will be responsible for contacting the prospects, how confidential the responses need to be and how prospects will be instructed to return questionnaires, the survey process may be conducted differently.

You can obtain the names and addresses of your target audience from several sources: customer lists, mailing lists available through list brokers, or membership lists available through associations.

Step #4: constructing the survey

Like most jobs, thorough and careful preparation of the survey will pay off in the end. Write out the kind of outcome, information and analysis that you want to obtain, and then design your survey based upon these specific needs — always keeping the respondent in mind. Be careful not to bias a survey to show the data that you want to see, but be certain to design it so you can get the information needed.

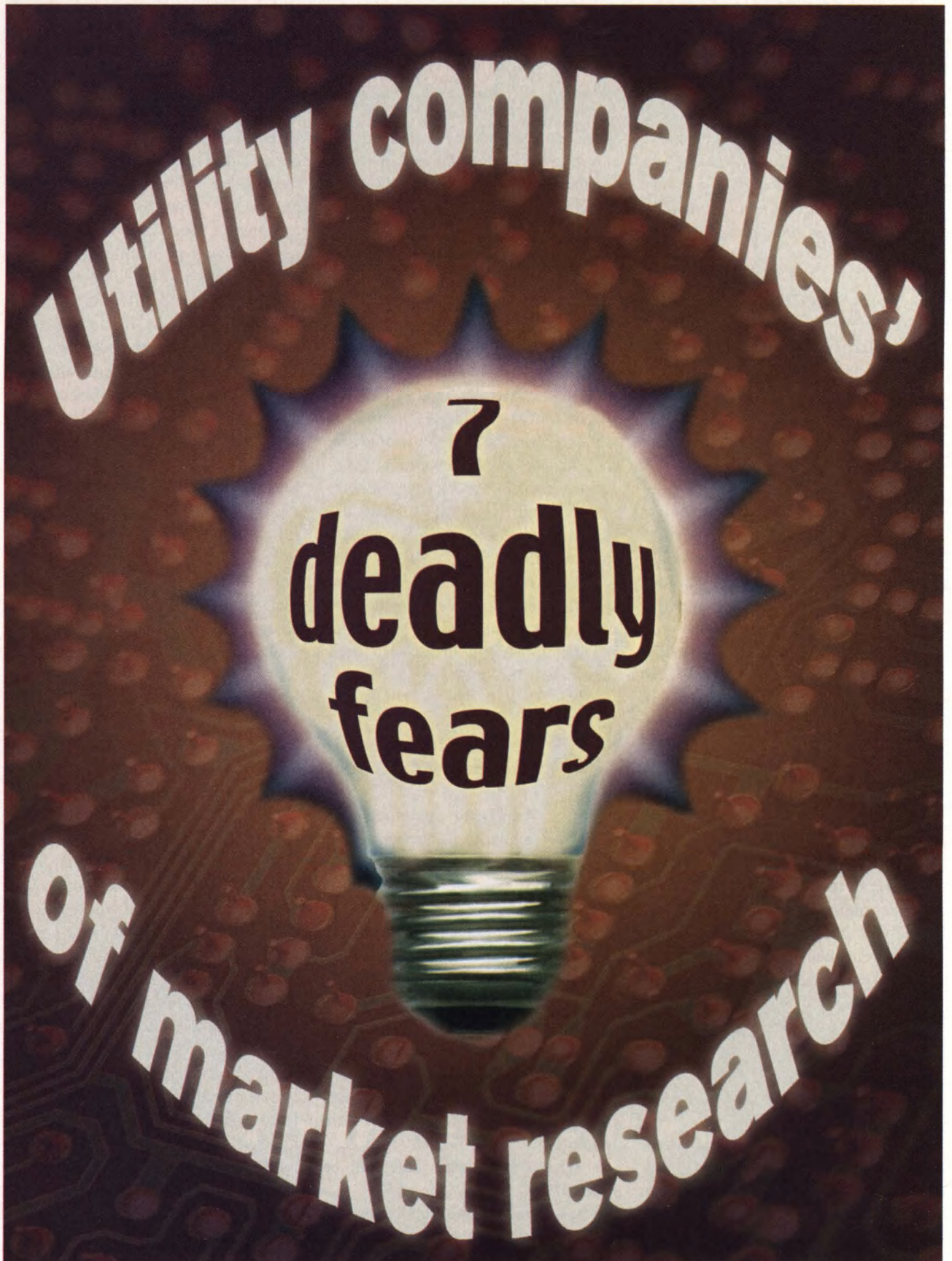
Typically, there are several parts to survey question design:

A) Type of information sought. Questions should be designed carefully in order to gather the desired information. As in all professional correspondence, thoughtful vision, clarity of language and semantics are critical to good communication. Think through the objectives of the survey when determining what topics of information to include in the survey.

B) Actual question structure and word choice. Surveys may include closed-ended questions (e.g., "Rate from poor to excellent your view of the ease of ordering from our company"), open-ended questions (e.g., "What do you like the most about the products we offer?") or a combination of both types of questions.

When writing or editing questions, you should scrutinize each question

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By Larry Chiagouris

Editor's note: Larry Chiagouris is managing director, CDB Research & Consulting Inc., New York. He can be reached at 212-367-6858 or at lchiagouris@cdbresearch.com.

It's not surprising that utility companies are devoting more resources than ever to their marketing communications programs, given the state of today's energy industry. Open markets and technological innovations are well on their way to recasting traditional energy supply chains, putting additional pressure on marketing managers, investor relations professionals and public relations agencies to communicate changes in the marketplace to their customers. In an ideal world, this dynamic would produce more opportunities for market researchers to provide communications professionals with the answers they need about consumer, media and investor perceptions of their companies. Unfortunately, we have seen that this is not always the case.

A Chinese scholar once said, "Ask a question and risk looking foolish for a minute; fail to ask a question and risk looking stupid for a lifetime." Many marketing managers in the utilities industry would do well to note this proverb. Despite evidence to the contrary, some communications professionals persist in the belief that research is a luxury for most communications programs. This despite the fact that market research conducted on the front end of new service announcements clarifies program objectives before utilities make a substantial investment in the programs themselves. As any savvy marketer will attest, research provides assurance not only that there is adequate demand for a proposed product or service, but also that the communications initiatives generated to support the program are targeted to the correct audience.

This said, why do communications professionals avoid using research to fine-tune business strategy? It is

undeniable that most people prefer to make decisions that are backed by hard numbers rather than gut instinct. The answer often lies with the managers themselves. Managers, like most human beings, tend to fear that which they do not understand.

It appears that many managers do not understand market research. Utility company executives suffer from the "Seven Deadly Fears of Market Research." "Deadly" because failure to conduct market research can often produce more problems — at a greater expense — than the research itself. It is our job as market research professionals to help clients overcome these fears to achieve their business objectives.

Fear #1: Market research doesn't work.

American businesses spent billions of dollars on market research last year. Is it likely that so many people spent so much money on a valueless proposition? Research defines the existing perceptions, needs and opinions of a product's target audience. In the process, it provides a benchmark from which to judge the success of any business program. Companies that conduct consumer research prior to offering new billing services, for example, have already determined the innovations that consumers would like to see in the next incarnation of the company's billing statement prior to revamping the existing template. By conducting research, management can understand the needs of their target audience before opening the ques-

As any savvy marketer will attest, research provides assurance not only that there is adequate demand for a proposed product or service, but also that the communications initiatives generated to support the program are targeted to the correct audience.

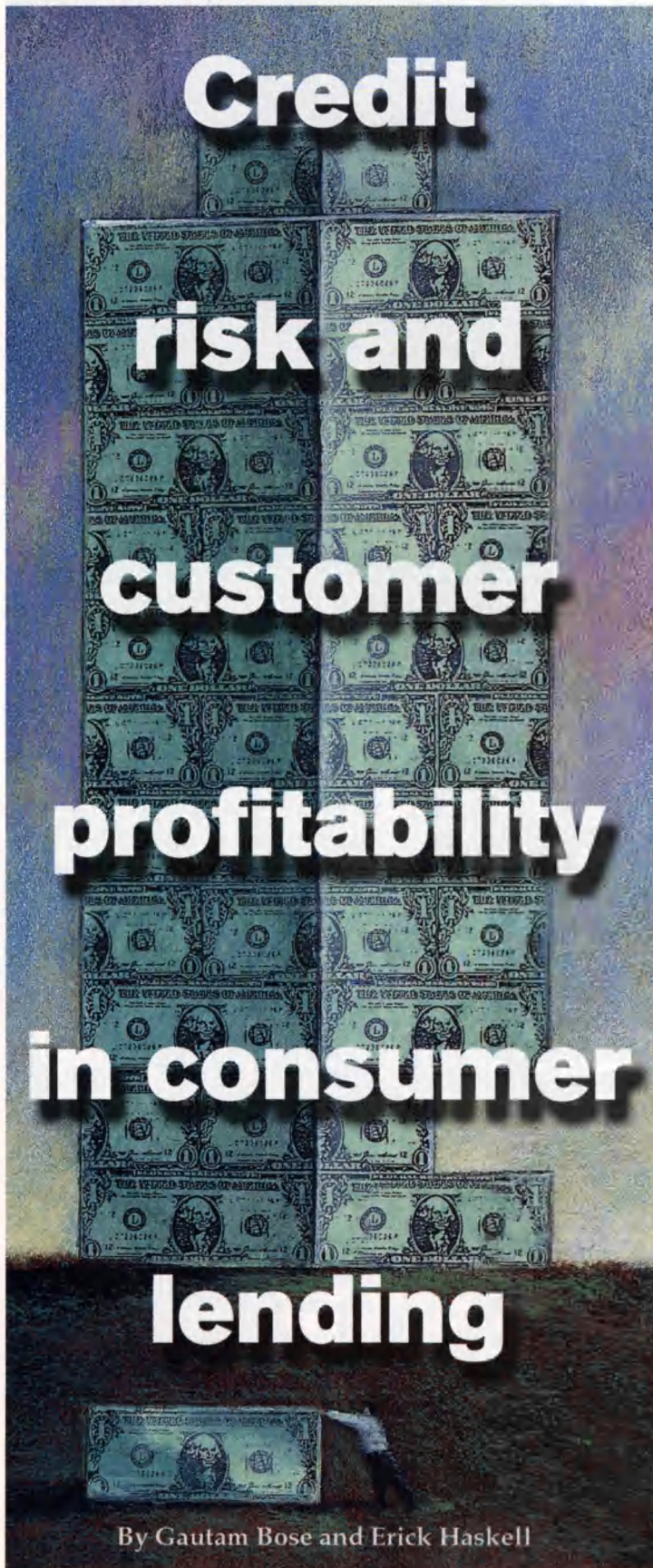
tion to debate.

In short, market research clarifies, educates and empowers managers to make strategic decisions with confidence. Research supports these decisions with hard numbers that back up the communications professional. It also provides insight into distribution practices, pricing plans and customer service programs. The pages of *Quirk's Marketing Research Review* and the files of the American Marketing Association and the Advertising Research Foundation contain example after example of the role research has played in almost every successful business endeavor. Research works.

Fear #2: Market research is too expensive.

Not every market research study requires extensive expenditures of time and money. The size and scope of the research study should be commensurate with the size of the opportunity or problem to be investigated. There are a variety of tools and

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By Gautam Bose and Erick Haskell

Editor's note: Gautam Bose is senior risk analyst at Banc One Corporation, Columbus, Ohio, and Erick Haskell is a senior consultant with Deloitte Consulting in Minneapolis. The authors are not writing in their professional capacities and the opinions contained in this article do not necessarily represent those of their respective employers.

In the past decade, two important business realities have factored prominently in the development of marketing strategies for most retail banks. First, a small percentage of customers, perhaps 20 percent, generally account for an overwhelming percentage of profits, often more than 80 percent. This is commonly referred to as "the 80-20 rule." Second, it is far more costly to acquire new customers than it is to retain existing ones.

With these facts in mind, banks have spent considerable time, money, and effort identifying their most profitable customers and developing strategies to retain them. Such strategies have included differentiated service, premier products, and preferred pricing (fee waivers, rate reductions, etc.) for a bank's most profitable customers. While such strategies have often proven effective in the retention of targeted customers, many banks' profitability metrics may not accurately identify the most high value customers, particularly if the customer has a loan or credit product. This is due to the failure of most banks' profitability metrics to adequately incorporate the individual risk of each customer.

Current approaches for incorporating consumer credit risk

Currently, most banks include a charge for loan loss provision in their customer profitability metrics for credit products. The charge for loan loss provision is generally an average determined at the product level. Each customer holding a particular product is allocated the same average charge for loss provision. Some banks use this same process for allocating a capital charge to customers as part of their profitability measurement.

Then, in an effort to incorporate risk, many banks will develop a matrix relating customer profitability to individual risk. As the graphic below shows, customer profitability is on one axis and risk is on the other, with risk typically represented by a credit bureau score.

Managers can then pursue specific strategies for customers within each quadrant. Obviously, a bank's highest priority is to retain those customers

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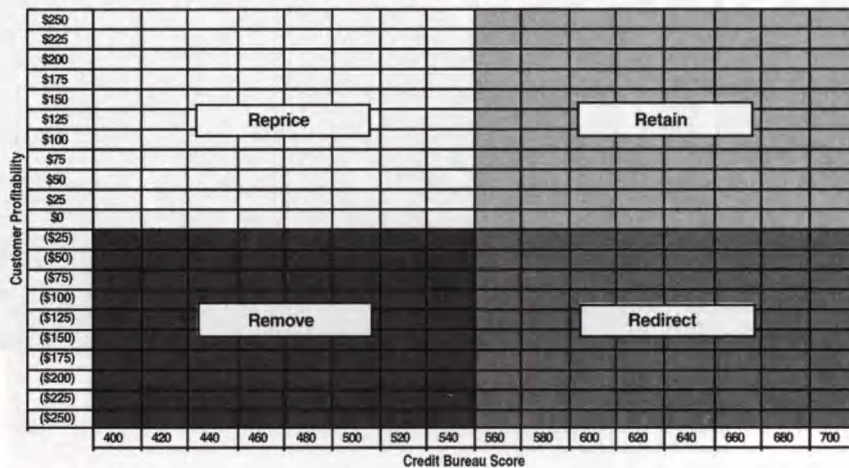
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who are most profitable with the lowest risk (highest credit bureau score). Those customers who are profitable but have low credit bureau scores

unprofitable customers, with low credit bureau scores should be strategically introduced to competitors if it is determined that they will not

customer data now resident in most banks. The matrix approach does not incorporate important drivers of customer behavior in the decision making process, such as other relationships with the bank, time on books, and demographic, psychographic, and socioeconomic factors.



The solution: risk-adjusted customer profitability model

Banks usually have a rich repository of customer information which, if utilized appropriately, can be very predictive of future customer behavior. Using advanced statistical analysis, tools may be developed that will allow multiple variables to be used for decision making. Specifically, to address the shortcomings of the matrix approach, banks should make individual risk adjustments at the customer account level within their customer profitability models.

should be re-priced so that their risk to the bank is compensated by higher fees or a higher interest rate. Unprofitable customers with high credit bureau scores should be redirected to low-cost channels or targeted for cross-sell opportunities. Finally,

become profitable in the future. While this method attempts to incorporate individual risk in the determination of customer profitability, it is still insufficient for accurately identifying high value customers, and it fails to make optimal use of the rich

The logic for making such an adjustment is no different than that which has been driving improvements in customer profitability measurement

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in recent years. Just as banks have diligently measured other elements of the profitability equation at the customer account level (e.g., cost of funds, account fees, transaction costs, etc.), they should now focus on attributing risk at the individual level. Below are the steps required to develop a risk-adjusted customer profitability model.

1. Identify significant predictive variables. In addition to credit bureau and behavior scores, banks have a wealth of customer data that can be used to increase the accuracy with which they estimate the likelihood that their customers will default on their credit obligations. Advanced multivariate regression techniques can easily identify the most significant variables from the vast number of predictor variables available on the customer databases. The dependent variable is credit default and potential independent variables come from the bank's entire repository of customer data, including account information (balance, time on books, other products held), behavioral data (payment history, credit utilization), and available demographic and psychographic data. Regression analysis will identify those variables that have the power to explain the probability of credit default. Most banks will be surprised to discover the predictive power of the data residing in their own customer information files.

2. Build probability of charge-off model (scorecard). After identifying the variables most predictive of customer default, the next step is to build a probability of charge-off model — or scorecard. The scorecard uses the predictive variables, along with historical customer charge-off data, to arrive at a probability of charge-off for every customer. Specifically, the model is developed using statistical software tools to query the customer information file with data for the past 12 or 24 months. The query returns the average incidence of default for every combination of the predictive variables. Visually, the model would appear as a multidimensional object with each cell representing the probability of charge-off for customers possessing particular characteristics represented

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by the predictive variables. For example, a customer with a home equity line of credit, who has been on the books for 14 months, who frequently draws the line to its limit, and who also has a checking account at the bank, may have a 1.17 percent probability of charge-off over the next 12- or 24-month period.

3. Incorporate risk adjustment. After developing the scorecard, the charge-off probabilities should be incorporated into the customer profitability calculation by applying a probability of charge-off to each customer account. The mechanics of this step are generally the same for most profitability metrics, including customer contribution, net income after capital charge (NIACC), or lifetime value. Essentially, the risk adjustment is carried out by substituting an account level loan loss provision and an account level capital charge for their product level counterparts in the existing profitability calculation.

For customer Jane Doe, account level loan loss provision is equal to Jane's probability of charge-off mul-

Account Profitability (NIACC)	
Account Number 987654321	
Product:	Home Equity Loan
Date Opened:	12/11/97
Balance:	\$ 7,555.00
Interest Income	\$ 44.07
- Interest Expense	\$ 28.33
= Net Interest Income	\$ 15.74
+ Fee Income	\$ 1.50
- Variable Acct. Expense	\$ 3.72
- Loan Loss Provision	\$ 4.27
= Variable Acct. Contribution	\$ 9.25
- Fixed Acct. Expense	\$ 1.44
- Acquisition Expense	\$ 1.13
= Net Income Before Taxes	\$ 6.68
- Taxes	\$ 2.34
- Capital Charge	\$ 1.40
= Net Inc. After Capital Charge	\$ 2.94

plied by the outstanding balance on her loan (or the dollar limit on a revolving credit product) minus the expected recovery for secured products. For example, if Jane has a probability of charge-off equal to 3.39 percent, an outstanding loan balance of \$7,555, and an expected recovery

rate of 80 percent, her account level loan loss provision is equal to \$51.22 ([\$7,555 x 3.39%] x [1-80%]), or \$4.27 on a monthly basis. This amount replaces the product-driven loan loss provision in most profitability models.

To derive the account level capital charge, each customer must be assigned a risk factor, which is also derived from the probability of charge-off model. The risk factor is calculated by dividing the customer's account level loan loss provision by the total outstanding balances (less expected recovery) for that product. The resulting risk factor represents the percentage of total risk for that product represented by each customer. Next, account level capital charge is derived by multiplying the risk factor by the total capital allocated to that product.

It is important to note that although this process may seem like a substantial undertaking, it is likely that other departments within the bank are probably already performing some of these steps for other functions. For



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example, during the loan approval process, most banks use scorecards akin to the probability of charge-off model described above. Similarly, the bank often analyzes the existing customer base for risk management purposes. Therefore, adding a customer level risk adjustment to the existing customer profitability model may simply involve leveraging existing techniques in other parts of the bank.

It is also important to note that there are several critical prerequisites for successfully implementing a risk adjusted profitability model. These include:

- Mastering the basics. Guarantee that the fundamentals of profitability analysis, such as activity-based costing, funds transfer pricing, and risk-adjusted capital allocation, are correct.
- Warehousing the data. Design a customer database with accurate data that is regularly updated and validated.
- Acting on the information. Ensure the availability of technology that will communicate the customer knowledge from the Risk Adjusted Profitability Model to the front-line customer service representatives so that it is used at the time of customer contact.

Competitive advantage

Successful retail banks are devoting as much time and effort to customer retention as they are to new customer acquisition. Retaining profitable customers and devising successful strategies to increase the value of unprofitable customers will be the single largest source of competitive advantage in the coming years. Achieving this competitive advantage requires that banks have the ability to accurately identify their high value customers. Traditionally, customer profitability analysis has not adequately incorporated credit risk at the individual level. By developing risk-adjusted customer profitability metrics that take full advantage of new technology and the wealth of customer data available in most institutions, banks will ensure that their retention efforts are truly targeted at the most profitable customers. **TC**

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Closing the customer satisfaction gap

By William Nowell

Editor's note: William Nowell is president and CEO of ServiceTrac, a Scottsdale, Ariz., research and mystery shopping firm. He can be reached at 602-941-3121.

Intense development, consolidation and growth present challenges to today's companies that arguably exceed those at any time in the past. The new ways to win seem counter to tradition: act small, like an entrepreneur. Even if you are large, stay nimble; be intimate with your customers. Focus on strengthening relationships with them. And most importantly, remember the secret is to be a customer service-based business. The companies that are able to keep a customer focus will continue to be successful even into the foreseeable future when availability of options and price will no longer be key differentiators for potential customers.

The movement to develop intimacy and an understanding of how customers define value has grown from a groundswell to a tidal wave. Value reflects a customer's wish to get more for the money, time and effort they

have invested. The first step in creating value involves understanding what value means from a customer's point of view, how value perceptions are formed, how they can be influenced and how customers relate service quality and price in the deliberations about perceived value.

Many companies address the value issue by providing a variety of services and price options and by offering flexibility; others focus on providing specialized service in niches of the market where customers can get the exact services they need, provided in an environment that is tailored to their situation.

As important as value is, and in the light of these examples, it is interesting that recent studies revealed that questions about perceived value are not usually present in industry satisfaction questionnaires, and when they are, the ratings are often not impressive. There is still room for companies to better understand value.

Critical strategy

You can't visit the issue of value without including service quality.

Most industry managers agree that customer service is the most critical strategy to long-term viability, more than any other initiative — especially since, in many industries, price no longer differentiates companies. This is an important concept because, in the absence of a value (quality service) differentiation, price ends up being the factor most widely used by customers to make purchase decisions.

Progressive companies need to understand how customers define value (quality service) and then deliver on the standards set, and powerfully and convincingly communicate to the customers to effectively close the gap between customer perceptions and customer expectations.

Unless companies understand these changes and adjust for their impact when designing, marketing and delivering services, they are unlikely to succeed.

Introducing the Gaps Model for Customer Service

The Gaps Model of Customer Service Quality was developed by Valerie Zenthaml and the Texas A&M

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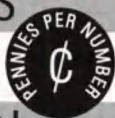
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University Center for Retailing Studies. It outlines the potential roadblocks that hinder a service organization's ability to close the gap between the customer's expectations — "the standards or reference points by which a service experience is provided" — and perceived service — "the customer's perception of what actually did, should or will occur." For example, when you visit a fast-food restaurant, you expect a level of service significantly different than what you would encounter at an expensive restaurant. Many factors affect customers' expectations, including marketing, advertising and sales promotions as well as innate personal needs, word-of-mouth and competitive offerings. Knowing what customers want and how they assess what they receive is the best way to design effective services and position your company for success.

For a better understanding of the steps companies can take to measure service satisfaction, we can briefly discuss the four key potential gaps.

Gap 1: not knowing what customers expect

Gap 2: not selecting the right service standards

Gap 3: not delivering the service standards

Gap 4: not matching performance to promises

Gap 1

It is important to know what customers and their family members expect. Sometimes this is as simple as sitting down with the customers on a regular basis and having a conversation; and at times it can involve much more detailed and rigorous research, including industry focus groups, satisfaction surveys and structural brainstorming. Recently, one company took the time and effort to perform several detailed focus groups with customers and potential customers to discuss what they liked about a proposed store design. The results of that research



helped shape the design of the building and the design of the service programs that were being developed. We can never know too much about the changing needs and expectations of our customers.

Gap 2

Accurate perceptions of a customer's needs are important, but not sufficient, for delivering superior or quality service. Sometimes the service standards are not designed properly due to a belief that the standard is unattainable, e.g., adapting a standard of 100 percent satisfaction in a specific area. Although these assumptions are valid in some situations, they are often rationalizations for management to tackle head-on the difficult challenge of setting service standards. When setting service standards, it is important to have commitment. The

Employees need to understand the role they play in the company and its ability to deliver on its mission. The employees need to work as a team and they need to be trained properly.

quality of service is determined by the standards set. Employees need to understand how the company and customers define a quality job by having quality standards clearly defined. Employees' performance can be measured and employees can be trained effectively. Leadership is also important when addressing standards. As Nordstrom President Bruce

Nordstrom has said, "Employees will do what is clearly communicated, consistently measured and openly rewarded every single time."

Strategic measurement systems are also necessary to close this gap. If customer satisfaction is to become a focus of strategy, companies must incorporate state-of-the-art measurement systems. These systems should be backed by reliable research and be carried out in a manner consistent with satisfaction measurement protocol.

In an effort to help with this issue, some mystery shopping companies have created national benchmarks. These companies collected up to 100,000 surveys in 1998 and benchmarked the results to create the first mystery shopping satisfaction database. By using a standardized survey tool, which has been professionally designed, and using the database to compare results, companies can



accelerate the process of creating superior quality standards. Industry benchmarks are available in many different industries including automotive, housing, medical, retail, etc.

Gap 3

Standards need to be backed by appropriate resources (people, systems, and technology). By far the most important resource is people. Progressive companies need to ensure that the people they hire have a customer service attitude and a real appreciation for the senior customer. Companies have learned that the way they deliver service is much more important to the overall perceived quality than the array of services they provide.

Employees need to understand the role they play in the company and its ability to deliver on its mission. The employees need to work as a team and they need to be trained properly. As

new industries develop, it will become increasingly important for technological advances such as interactive CD-ROM or computer-based training to be incorporated as a standard tool to insure that front-line employees have the attitude, skills and knowledge to provide the service outlined in the standards. It's interesting that convenience store companies such as Circle K Food Stores interview, do skills assessment and provide the first seven hours of training to new employees on CD-ROM before the employee is ever allowed to meet a customer.

Gap 4

Promises made by companies through its advertising, sales force and

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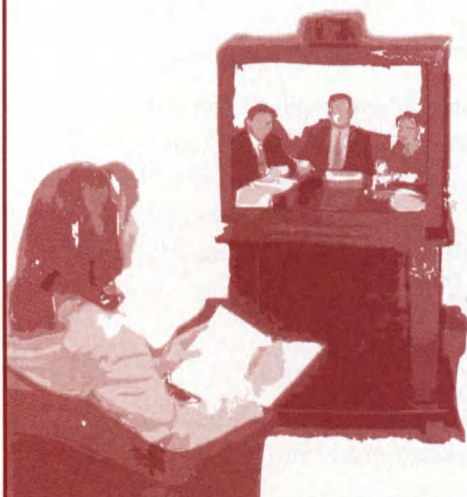
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Key Factors Leading To The Provider Gaps

Gap 1

Inadequate marketing research orientation

- Insufficient marketing research
- Research not focused on service quality
- Inadequate use of market research

Lack of upward communication

- Lack of interaction between management and customers
- Insufficient communication between contact employees and managers
- Too many layers between contact personnel and top management

Gap 2

Absence of customer-driven standards

- Lack of customer-driven standards
- Absence of process management to focus on customer requirements
- Absence of formal process for setting service quality goals

Inadequate service leadership

- Perception of unfeasibility
- Inadequate management commitment

Poor service design

- Vague, undefined service designs
- Failure to connect service design to service positioning

Gap 3

Deficiencies in human resource policies

- Ineffective recruitment
- Role ambiguity and role conflict
- Poor employee-technology job fit
- Inappropriate evaluation and compensation systems
- Lack of empowerment, perceived control, and teamwork

Gap 4

Ineffective management of customer expectations

- Failure to manage customer expectations through all forms of communication
- Failure to educate customers adequately

Overpromising

- Overpromising in advertising
- Overpromising in personal selling
- Overpromising through physical evidence cues

Inadequate horizontal communications

- Insufficient communication between sales and operations
- Insufficient communication between advertising and operations

other communications may raise customer expectations. If communications set up unrealistic expectations for customers, the actual experiences will be disappointing. One prevalent area this can happen in is the initial meeting and adjustment period. Research has shown that potential customers have a great deal of apprehension about the purchase process. It is important that the marketing person set up realistic expectations about how the process will flow, and that the company have a clear program of integrating, so to speak, a new prospect into the company to keep the fresh positive impression about the company as high as possible through the purchase process.

Pulling it all together

Making your company customer-focused starts with a mission and a vision, including the process through which the company's values are designed to complement customers' values and are brought to life in the everyday operation of the company. Superior quality requires attention to

details and to the measurement of perceptions and expectations, and systems to address issues before they are allowed to detract from the vision. It also requires leadership to continue to drive the values of the company to the

front-line interactions that each employee has with each customer. Management and front-line service providers must understand their goals and have the resources to deliver what is promised. **14**

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"Gimme what you've got"

By J. Kevin Bokeno

Editor's note: J. Kevin Bokeno is president of Keynote Consulting, an Advance, N.C., research consulting firm. He can be reached at 336-998-9429.

It's 6:30 Wednesday evening and a home owner, we'll call him John, needs to mow his lawn. The problem is that John's lawn mower is broken and he hasn't had the time to try to fix it. So, he leaves work and drives to the nearest mall that has a department store that carries such things and, after flicking through two or three informational brochures and staring at a couple of "looks like they could do the job" candidates, he flags down a clerk, points out his choice, whips out a credit card, and is on his way. Total transaction time: 22 minutes.

"So what?" you say. You like a man

who knows what he wants.

The problem is that John didn't know what he wanted. What he did know, however, was that he needed to buy a lawn mower and get his lawn mowed that night. If he didn't do it, it could very well be a couple of weeks before he had another opening. So, John made a \$324 purchase decision in about 22 minutes.

We've heard of another couple who bought a brand new van in slightly over an hour. Did they comparison shop on the Net? Collect sell sheets to pinpoint the desired and required features prior to the purchase? Nope. They needed the van and had from 9:00 to 11:00 on Saturday morning open before another weekend crammed with soccer, dance, and alas, work spillover from the week before.

Did they get a good deal? Probably

not. Did they get all the features they wanted? Doubtful.

However, this couple made a very conscious, and increasingly very typical, tradeoff. Even in this traditionally high-involvement purchase, they were willing to risk making a sub-optimal purchase decision in order to "get it over and done with and get on with our lives."

Impulse-buying behavior is not only increasing in traditionally high-involvement categories, but in day-to-day purchases as well. POPAI's (the Point of Purchase Advertising Institute) Consumer Buying Habits Study indicates that in-store decision-making behavior for packaged goods has risen over the last decade and that brand switching rates are also going up. Unlike the deliberate purchase decision process that characterized

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our parents' generation, we Boomers are increasingly shunning deliberation for efficiency.

For my father, buying a lawn mower was a saga.

It would entail no fewer than four retail outlets, stacks of information about engine size, blade width, etc., untold phone calls to neighbors and other men in the family, and even after a mower was selected, post-purchase dissonance that would last two to three summers.

But that was in the '60s, when product differentiation was re-emerging as an integral part of the selling process, a natural and predictable reaction to the "you make it, we'll buy it" demand curve of the post-WW II era.

The recession-burdened and angst-filled '70s put the emphasis on price as the key driver in purchase decisions (generics) and the '80s shifted it to the other side of the value equation by emphasizing brand names — the more conspicuous, the better.

If each generation has its buying experience label, the tightening of time constraints is certainly the dominant theme of the '90s.

Although somewhere in the back of our minds, we Boomers recognize that we should do our buying homework (and it's even easier given the availability of information), an increasing number of us simply want to fit the process into the allotted time.

Another reason we are willing to squeeze our buying decision process into a few in-store seconds is our relative affluence. Our haste does not

allow us to critically evaluate the value/price equation, but we willingly acknowledge this shortcoming going in; and, more importantly, we know

that if we make a mistake, we have the resources to cover it later.

As important as this trend would seem to be to marketers and marketing researchers, our traditional marketing and marketing research techniques haven't shifted to accommodate it. Our training is in building brands and there is no doubt that brand building will become even more important as this trend continues; however, how we build them may need re-examining in that the accepted "Hierarchy of Effects" model that describes the decision process from awareness to behavior may need to be retumbled. (See Fig. 1)

Our research clearly suggests that an increasing number of consumers are willing to shorten the purchase

decision time and act without the facts. For more and more of us, if a true need exists, behavior occurs after a very minimum level of product familiarity and actually before attitude formation. We call this the "microwave process" because there is a willingness to risk getting a less than optimal product to get it quicker. (See Fig. 2)

It is fairly easy to see how this trend will affect our traditional marketing practices. Intuitively, packaging, point of sale, and shelf placement will continue to gain in importance, as consumers make more and more of their purchase decisions in-store.

Fig. 1: Traditional Hierarchy of Effects Model

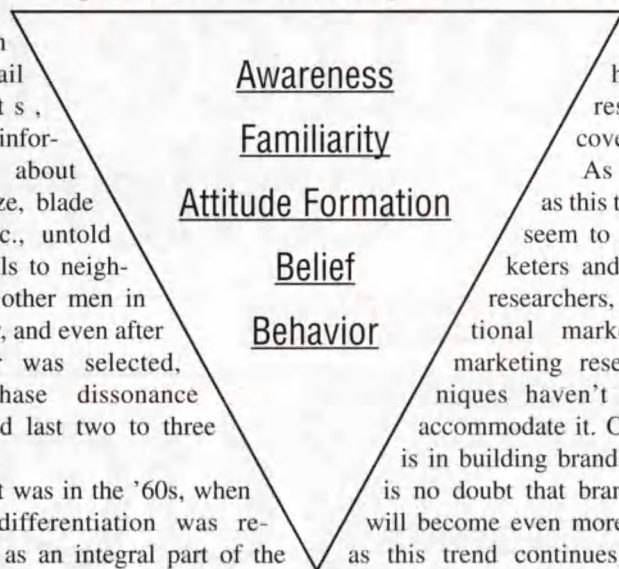
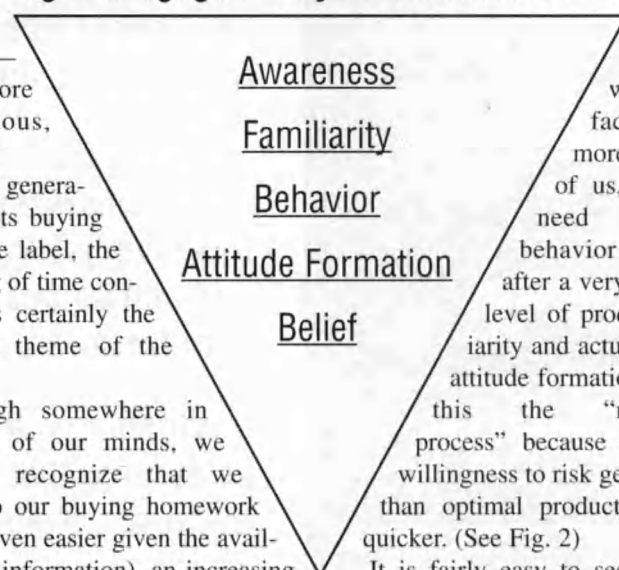


Fig. 2: Emerging Hierarchy of Effects Model in '90s



Logically, we could predict that store brands, getting preferred in-store treatment, will likely gain share as this trend becomes the norm. Also, existing brands with heavy equity should thrive in this environment as time-constrained consumers look for the "mark of quality" that established brand names and icons convey. What will fall by the wayside are those brands with marginal equity; and logically, spending behind new brand introductions will continue to shift to the trade. Product delivery will be held at an even higher premium, as attitudes and belief formation will occur following product experience

As important as this trend would seem to be to marketers and marketing researchers, our traditional marketing and marketing research techniques haven't shifted to accommodate it.


and be less encumbered by image-building advertising messages.

From a marketing research perspective, we are solidly behind this curve. While we continue to evaluate discrete components of the mix, we have not done a good job of understanding the integration of these components into the gestalt of the decision process; moreover, when attempts are made, they are with respect to the more traditional persuasion hierarchy model and not a reflection of today's consumer. Perhaps that is why we struggle to define motivation behind purchases in terms of product attributes and their benefits, when the real rea-

son may be more related to being in the right place at the right time.

Our firm is working with clients to understand the whole decision-making process for their category and how it's impacting them. For example, we urge our clients to reexamine the role of advertising in this paradigm. Is it to inform and educate or to reinforce a decision already made? Does more attention need to be paid to packaging and point of sale? Will the importance of relationship marketing increase

with this new trend?

These are just some of the issues we are addressing with our clients. As it turns out, "Just Dew It!" is more than a cute pun. It reflects, in fact, the common approach to purchase decisions in the '90s, and, while it may have always been the norm for soda pop, it represents a real paradigm shift for those marketers used to (counting on?) prospective buyers actively seeking out product information before making their purchase decision. 

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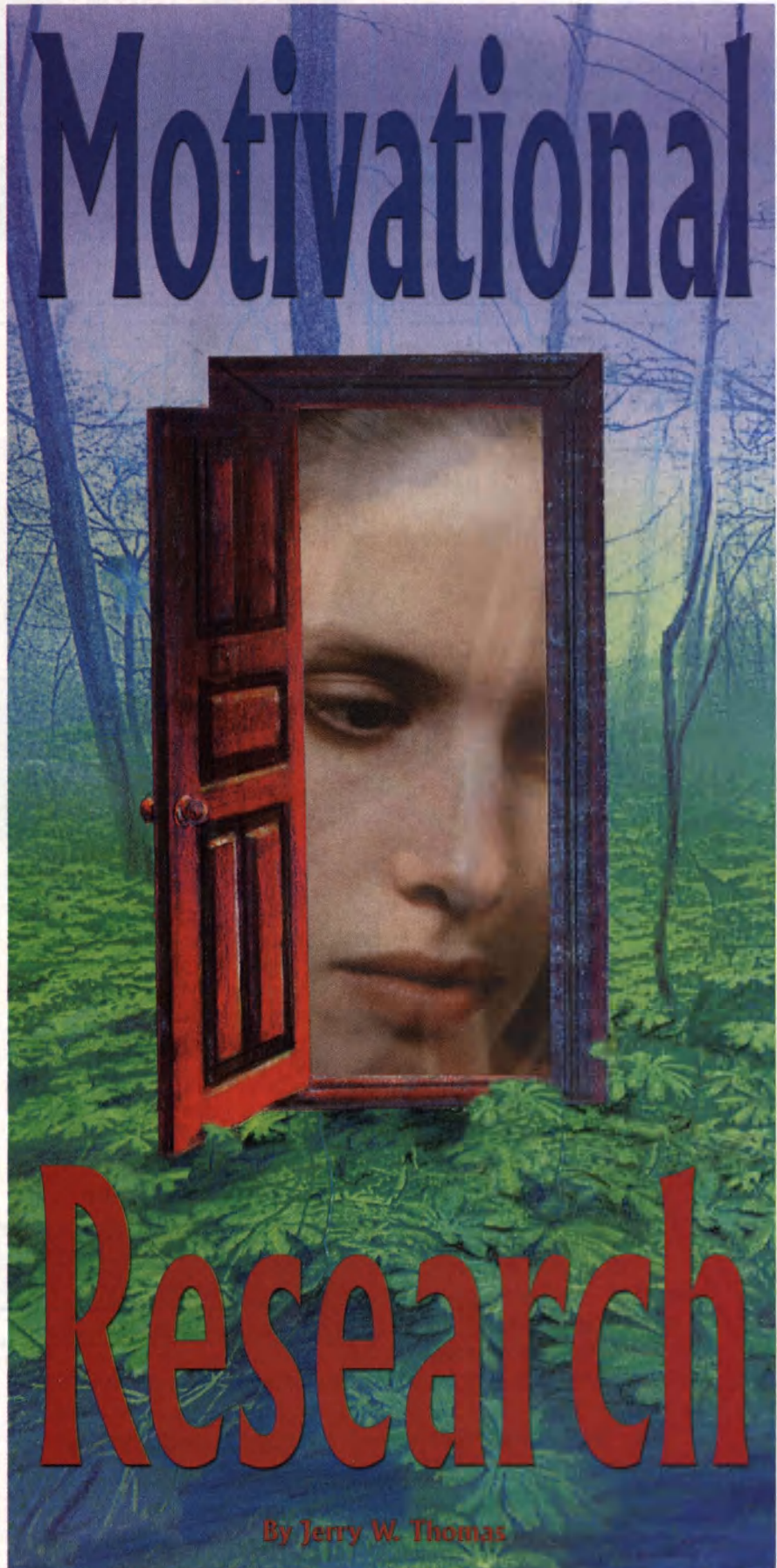
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Editor's note: Jerry Thomas is president of Decision Analyst, Inc., Arlington, Texas. He can be reached at 817-640-6166 or at jthomas@decisionanalyst.com.

Motivational research is a type of marketing research that attempts to explain why consumers behave as they do. Motivational research seeks to discover and comprehend what consumers do not fully understand about themselves. Implicitly, motivational research assumes the existence of underlying or unconscious motives that influence consumer behavior. Motivational research attempts to identify forces and influences that consumers may not be aware of (e.g., cultural factors, sociological forces). Typically, these unconscious motives (or beyond-awareness reasons) are intertwined with and complicated by conscious motives, cultural biases, economic variables and fashion trends (broadly defined). Motivational research attempts to sift through all of these influences and factors to unravel the mystery of consumer behavior as it relates to a specific product or service, so that the marketer better understands the target audience and how to influence that audience.

Motivational research is most valuable when powerful underlying motives are suspected of exerting influence upon consumer behavior. Products and services that relate, or might relate, to attraction of the opposite sex, to personal adornment, to status or self-esteem, to power, to death, to fears, or to social taboos are all likely candidates for motivational research. For example, why do women tend to increase their expenditures on clothing and personal adornment products as they approach the age of 50 to 55? The reasons relate to the loss of youth's beauty and the loss of fertility, and to related fears of losing their husband's love. It is also a time of life when discretionary

incomes are rising (the children are leaving the nest). Other motives are at work as well, but a standard marketing research survey would never reveal these motives, because most women are not really aware of why their interest in expensive adornments increases at this particular point in their lives.

Even benign, or low-involvement, product categories can often benefit from the insights provided by motivational research. Typically, in low-involvement product categories, perception variables and cultural influences are most important. Our culture is a system of rules and regulations that simplify and optimize our existence. Cultural rules govern how we squeeze a tube of toothpaste, how we open packages, how we use a bath towel, who does what work, etc. Most of us are relatively unaware of these cultural rules. Understanding how these cultural rules influence a particular product can be extremely valuable information for the marketer.

The major techniques

The three major motivational research techniques are observation, focus groups and depth interviews.

- Observation — Observation can be a fruitful method of deriving hypotheses about human motives. Anthropologists have pioneered the development of this technique. All of us are familiar with anthropologists living with the “natives” to understand their behavior. This same systematic observation can produce equally insightful results about consumer behavior. Observation can be accomplished in-person, or sometimes through the convenience of video. Usually, personal observation is simply too expensive, and most consumers don't want an anthropologist living in their household for a month or two.

It is easier to observe consumers in buying situations than in their homes, and here the observation can be in-person or by video cameras. Generally, video cameras are less intrusive than an in-person observer. Finding a representative set of cooperative stores, however, is not an easy task, and the installation and maintenance of video cameras is not without



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its difficulties. In-store observers can be used as well, so long as they have some "cover" that makes their presence less obvious. But, observation by video or human eye cannot answer every question. Generally, observation must be supplemented by focus groups or depth interviews to fully understand why consumers are doing what they do.

- **The focus group** — The focus group in the hands of a skilled moderator can be a valuable motivational research technique. To reach its full motivational potential, the group interview must be largely nondirective in style, and the group must achieve spontaneous interaction. It is the mutual reinforcement within the group (the group excitement and spontaneity) that produces the revelations and behaviors that reveal underlying motives. A focus group discussion dominated by the moderator will rarely produce any motivational insights. A focus group actively led by the moderator with much direct questioning of respondents will seldom yield motivational understanding. But

the focus group is a legitimate motivational technique.

- **The depth interview** — The heart and soul of motivational research is the depth interview, a lengthy (one to two hours) one-on-one, personal interview, conducted directly by the motivational researcher. Much of the power of the depth interview is dependent upon the insight, sensitivity and skill of the motivational researcher. The interviewing task cannot be delegated to traditional marketing research interviewers — who have no training in motivational techniques.

During the personal interview, the motivational researcher strives to create an empathic relationship with each respondent, a feeling of rapport, mutual trust and understanding. The researcher creates a climate in which the respondent feels free to express his feelings and his thoughts, without fear of embarrassment or rejection. The researcher conveys a feeling that the respondent and his opinions are important and worthwhile, no matter what those opinions are. The motiva-

tional researcher is accepting, non-threatening, and supportive. The emotional empathy between motivational researcher and respondent is the single most important determinant of an effective interview.

The motivational researcher relies heavily upon nondirective interviewing techniques. Her goal is to get the respondent to talk, and keep talking. The researcher tends to introduce general topics, rather than ask direct questions. She probes by raising her eyebrows, by a questioning look upon her face, by paraphrasing what the respondent has said, or by reflecting the respondent's own words back to the respondent in a questioning tone. Nondirective techniques are the least threatening (and the least biasing) to the respondent.

Projective techniques can play an important role in motivational research. Sometimes, a respondent can see in others what he cannot see — or will not admit — about himself. The motivational researcher often asks the respondent to tell a story, play a role, draw a picture, complete a sentence, or associate words with a stimulus. Photographs, product samples, packages, and advertisements can also be used as stimuli to evoke additional feelings, imagery and comment.

During the interview, the researcher watches for clues that might indicate that a "sensitive nerve" has been touched. Long pauses by the respondent, slips of the tongue, fidgeting, variations in voice pitch, strong emotions, facial expressions, eye movements, avoidance of a question, fixation on an issue, and body language are some of the clues the motivational researcher keys on. These "sensitive" topics and issues are then the focus of additional inquiry and exploration later in the interview.

Each interview is tape-recorded and transcribed. A typical motivational study, consisting of 30 to 50 depth interviews, yields 1,000 to 2,000 pages of typed verbatim dialogue. During the interview, the motivational researcher makes notes, about the respondent's behavior, mannerisms, physical appearance, personality characteristics, and nonverbal com-

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munications. These notes become a road map to help the researcher understand and interpret the verbatim transcript of the interview.

The analysis

The motivational researcher reads and rereads the hundreds of pages of verbatim respondent dialogue. As she reads, the researcher looks for systematic patterns of response. She identifies logical inconsistencies or apparent contradictions. She compares direct responses against projective responses. She notes the consistent use of unusual words or phrases. She studies the explicit content of the interview and contemplates its meaning in relation to the implicit content. She searches for what is not said as diligently as she does for what is said. Like a detective, she sifts through the clues and the evidence to deduce the forces and motives influencing consumer behavior. No one clue or piece of evidence is treated as being very important. It is the convergence of evidence and facts that leads to significant conclusions. In the scientific tradition, empiricism and logic must come together and make sense.

The analysis begins at the cultural level. Cultural values and influences are the ocean in which we all swim and, of which, most of us are completely unaware. What we eat, the way we eat, how we dress, what we think and feel, the language we speak, are dimensions of our culture. These taken-for-granted cultural dimensions are the basic building blocks that begin the motivational researcher's analysis. The culture is the context that must be understood before the behavior of individuals within the context can be understood. Every product has cultural values and rules that influence its perception and its usage.


Once the cultural context is reasonably well understood, the next analytic step is the exploration of the unique motivations that relate to the product category. What psychological needs does the product fulfill? Does the product have any social overtones or anthropological significance?

Does the product relate to one's status aspirations, to competitive drives,

to feelings of self-esteem, to security needs? Are masochistic motives involved? Does the product have deep symbolic significance? And so on. Some of these motives must be inferred since respondents are often unaware of why they do what they do. But the analysis is not complete.

The last major dimension that must be understood is the business environment, including competitive forces, brand perceptions and images, relative market shares, the role of advertising in the category, and trends in the marketplace. Only part of this business environment knowledge can come from the respondent, of course, but understanding the business context is crucial to the interpretation of consumer motives in a way that will lead to useful results. Understanding the consumer's motives is worthless unless somehow that knowledge can be translated into actionable marketing and advertising recommendations.

Sometimes, a motivational study is followed by quantitative surveys to confirm the motivational hypotheses as well as to measure the relative extent of those motives in the general population. But, many times motivational studies cannot be proved or disproved by survey research, especially when completely unconscious motives are involved. In these cases, the final evaluation of the hypothesized motives is by the testing of concepts (or advertising alternatives) that address the different motives, or by other types of contrived experiments.

One final note is relevant to the successful conduct of motivational research. It is critically important that the motivational researcher not be overly theoretical. An eclectic, wide ranging, and open-minded philosophical perspective is best. The researcher should not formulate any "cast in stone" hypotheses before she conducts the motivational study. Strongly held hypotheses, or rigid adherence to theory, will doom a motivational study to failure. Too often we see what we set out to see, or find that for which we search, whether it exists or not. An objective, open, unfettered mind is the motivational researcher's greatest asset. 



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Strengthen your brand's equity with a brand contact audit

By Harry Vardis

Editor's note: Harry Vardis is founder of Creative Focus Inc., an Atlanta qualitative research firm. He can be reached at 404-256-7000.

In an article in the February 1998 issue of *QMRR*, I stated that "A brand is a living entity in the consumer's mind." Actually brands are like children. We give birth to them, we groom them, we talk about them, we dress them right and we present them to the world.

A small difference: Children become self-sufficient after some point in their lives (at least some do!). Brands seem to need the undivided attention of brand managers all their lives if they are going to survive in a competitive environment.

Recently I was on a business trip in Fort Lauderdale, Fla. I had reservations at the Holiday Inn, right on the beach. It was dark when I arrived and as I approached the hotel I noticed that the letter "H" was black. The electrical connections were not working so the name of the hotel was "oliday Inn."

Unusual, but I knew what the name was. My first reactions: "Who is minding the store?" and "I wonder if they pay as much attention to the inside as they do to the outside!"

At the check-in I was greeted by a very pleasant clerk who was extremely accommodating. My room had a great view but I could not open the window to get the ocean breeze. Well, I was not spending that much time in my room so I let it go, although I felt that little twinge of disappointment we all feel when something is not going the way we want it. Had this been a vacation trip, an open window would have been on the top of my list of important items but since I was there for only a few hours it did not really matter.

What I realized during my visit was that the contacts I had with the people at this hotel were extremely positive but my contacts with the physical aspects of the operation (i.e., signs, windows, parking, elevators) left me rather disappointed. Overall my stay was a positive experience given my

circumstances.

This is an example of what Don Schultz, the dean of integrated marketing communications, calls a brand contact audit, or, the opportunities a brand has to come in contact with its consumers and the impressions it creates during these contacts. This notion holds true whether your brand is a hotel, a bank, an airline, a telephone company, or for that matter any service industry or any consumer product that sells through supermarkets, mass merchandisers, drug stores or any other outlet.

Benefits of a brand contact audit

Brand contact audit studies are essential tools for brand managers and can address several key objectives:

1. They can identify strengths and opportunities for operational improvements.
2. They identify opportunities for new product introductions.
3. They identify opportunities for communication strategies and can build greater efficiencies in the

In-store studies grow in importance

In the retail environment shoppers don't have to "remember," they're already there. The store shelf and shopping experience can be part of the stimulus.

By William J. Hruby

Editor's note: William Hruby is a market research and advertising consultant with nearly two decades of packaged goods marketing experience.

A quandary exists for packaged goods marketers: Consumers often think about crucial product or marketing issues only while they stand at the shelf. Yet research is most commonly conducted in malls, mail panels and other locations far removed from the point-of-sale. The fact that 100% of all buying decisions are ultimately made at the shelf favors the case for in-store research.

Go where the shoppers decide to buy.

To capture those fleeting points which translate into product A being selected over product B, consumers must be intercepted in the store where top-of-mind issues are present. Meet that same consumer in a mall two weeks later, and, **IF** you can get them to speak with you at all, it is highly unlikely they can remember their purchase decisions, awareness of brand options, motivations for purchase, etc. And certainly not with the same degree of accuracy as an interview conducted at the point-of-purchase.

Participation is a major and growing problem for traditional research methods. Mall wave-off rates (shoppers who refuse to even be approached) hover around 90%, compared to in-store wave-offs which are more typically 30-50%.

In a recent issue of *Marketing Research* (Spring, 1998), authors Bearden, Madden and Uscategui summarized this point. In their report they emphasize that the pool of qualified respondents is drying up. Their concern: "Lack of representativeness resulting from refusals to participate . . . jeopardizes the accuracy of survey results. Evidence suggests that the decline in participation rates is already occurring and may accelerate."

Three questions you should ask: Prior to going to field, cutting edge market researchers ask themselves three questions, according to Dr. Herb Sorensen of Sorensen Associates

- 1) What information is needed?
- 2) Who has that information?
- 3) Where are they; and are most capable of providing the information?

For packaged goods researchers involved in concept, prototype and related phases of product development who rely on

Product Guidance Research, the answers often point to in-store research.

Sorensen Associates has available over 40,000 retail locations in the U.S., and the technology to execute fieldwork in a few days. This infrastructure is at the foundation of the firm's reputation for conducting demographically structured studies at the neighborhood level.

Researchers now have new and better options for collecting consumer information - *at the point of purchase.* ■



Purchase-intention surveys can take you only so far; marketers would also do well to observe consumers in real buying situations.

Harvard Business Review
May-June 1998



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brand's communications program.

4. They profile the brand's personality and provide opportunities for improvements or changes.

5. They assess the consistency of the brand's external contacts with consumer expectations and brand personality, and identify opportunities for communications through direct marketing programs or other communications vehicles.

Here we will state the obvious: Not all consumers of a given brand are created equal. There are heavy users, light users, high potential non-users, young, old, males, females and you can add to the list every type of segmentation that seems relevant to your particular brand. This matrix of possibilities makes for an interesting challenge when you do a brand audit.

Be sure you cover your most important audiences because you may discover that you have not only different contact points for each one but the prioritization of your contact points may differ from audience to audience. The level of expectations of a budget traveler may be significantly different

from that of an investment banker or from that of a tourist and these different expectations will yield different results.

The same will be true when you change distribution channels. Walking into a department store and seeing brand name clothing in piles translates into low price, high volume, low-cost service, no return transactions. Neatly stacked merchandise, full-service policy, customer oriented salespeople translates into first-class expectations with customer satisfaction in mind.

Category criteria

It is very important to establish the category criteria consumers use when building the inventory of contact points. The criteria are the reasons why someone buys that category. This information can be obtained by asking several times the question:

"What do you look for when shopping for . . ."

And it can be followed with the question:

"What is important to you when you

shop for . . ."

The criteria list becomes the screening mechanism that helps evaluate the delivery of the expectations at the various contact points. Not all criteria will be used at every contact point but all will be used at one point or another.

How to conduct a qualitative brand contact audit

During a brand contact audit, the participation of the brand's management is critical and the researcher must have access to as many individuals including the advertising agency to obtain input. Depending on the objectives of the study, the specific information collected may vary but the administration of the project is similar.

1. Start by creating a list of as many contact points as possible. This list is generated through internal personal interviews conducted with management and agency people. If possible, as a researcher make every effort to use the brand yourself. This is important later on in the process of understanding the nuances that come up for the users. The language used for these contact points should be the language consumers use and not the technical language management may be using.

2. A list of these contact points should be made and printed in a form that is readable in a normal focus group room by all members of the group when you put it up on the wall.

3. Decide on the segments of consumers you will want to utilize for the brand audit, i.e., heavy users, light users, etc. Recruit verbal and "experienced" consumers. During the session, establish category contact points and eventually the particular brand's contact points from the consumers' perspective. The respondents may need to be paced so that they can follow a logical pattern and not wander randomly. There will be a place for random wandering in a minute!

4. Take the respondents through the process for the brand in question and at least one other brand, preferably a key competitor. This will enhance the gaps that exist in the audit and pinpoint later the need for changes. Develop at this point a contact list that



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is consumer-based. This list is to be posted next to the one generated by management so that the duplicates will be eliminated. The "net" list will be evaluated later during the session.

5. Be sure to explore all the contacts: physical, emotional, behavioral, static, dynamic etc. Pay particular attention to those items that may not come directly in contact with the participants but may be contacts for another individual in the purchase/usage chain, e.g., secretaries, assistants, travel agents, children, wives, husbands etc. Use sounds, images and feelings.

6. Consider the differences in language used by the respondents and the management of the brand. If there are differences explore them. Ask about and define the differences. This area may present opportunities for new names that are consumer-based rather than the convoluted acronyms that management tends to use.

7. Use free association exercises to enhance the "linear" list of contact points you have created. You may want to use analogies, picture sorts,

metaphors, forced fit exercises or collages to enrich the list.

8. Using an evaluation matrix select the 10 most important contact points (it's a place to start, later you can explore the rest). The matrix addresses the contact point, the consumer's expectations, the actual experience, the belief created, the importance of the contact in judging the brand and the suggested next steps. The matrices, when completed, are discussed by the participants during the session. Later, they are analyzed and the results are summarized and presented to the brand management team with recommendations.


9. The sessions last two hours. Focus group settings are the most productive and efficient way to conduct these brand audits. Quantitative evaluation may be necessary in some cases although in most cases a qualitative study delivers the desirable results.

Minding the details

Building a brand's equity means minding the details. Minding the tac-

tics is not what a lot of people want to do these days. They would rather concentrate on strategy, which deals with the big picture. This type of study is about the details that make up the big picture.

Someone has to mind the details and in my 30 years in the research business I have seen how brand managers sweat the details, build brands slowly and carefully and care about their brands as they do about their children. When you look at brands like Coca-Cola, Gillette, Nike, Nordstrom, The Ritz Carlton, Levi's jeans and other category leaders you can see the meticulous detail they go through to be sure that all points of contact with the consumers are consistent with their expectations, deliver on expectations and lead the way to new expectations.

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Survey Monitor

continued from p. 8

Internet research and consulting firm. By year-end 1998, some 20 million surfers fit this description. As powerful as this fact is, the new company still faces a user acceptance challenge because Netscape's users differ dramatically from AOL's users, according to Cyber Dialogue.

"Based on audience reach, this deal makes AOL the hands-down winner of the race to capture on-line eyeballs," says Thomas E. Miller, Cyber Dialogue vice president. "However, our surveys show that Netscape's typical customer is far more business-like and oriented toward efficient use of the Internet. They're not likely to tolerate a barrage of unsolicited on-line merchandising offers."

Overall, AOL properties under the new deal will reach some 70 percent of the U.S. on-line market, including the third that begin their on-line sessions either by signing on to AOL or to Netscape's Netcenter. This market dominance will allow the company to

leverage advertising sales and merchandising by offering on-line vendors package deals across various AOL properties. AOL should also be able to expand the Netscape browser market installed base by four million users or more, depending on whether AOL decides to continue distributing Microsoft Internet Explorer.

The biggest challenge facing AOL's new megalith has to do with developing content and features that appeal to the diverse audiences represented by the merged companies. Cyber Dialogue's data reveal that Netscape users are more reliant on the Internet to make personal choices, including choosing an Internet access provider. For example, users who rely on Netscape as their primary Internet browser are 40 percent more likely than AOL users to have switched access providers in the past year, according to Cyber Dialogue's research.

Overall, Netscape users are much more likely to view the Internet as a workplace productivity tool, as seen in the accompanying table. In addition, Netscape users who do not currently

use AOL are twice as likely to be destination shoppers who go directly to vendor or retailer Web sites to look for product information rather than shop on-line from their service provider or other on-line venues. These differences confirm that AOL must move carefully in building strategies to integrate service content and features to avoid alienating its newly acquired Netscape user base.

For more information call Dana Simmons at 800-965-4636 or visit the company's Web site at www.cyberdialogue.com.

Study finds companies re-engineering brands

Major companies are aggressively rebuilding their brands to boost their images, stand out from the corporate pack and attract investors, according to study by the New York-based Conference Board.

The study, which examines the strategy behind some of the world's most prominent brands, includes surveys with 106 marketing and communications executives of companies based throughout the United States and Europe. Companies in the study include Microsoft, General Electric, IBM, Lego, Kodak, Levi Strauss, Bass PLC, 3M, DuPont, and Chase.

Some 43 percent of the surveyed firms have initiated a new brand strategy since 1995, aimed at increasing customer loyalty, differentiating their brand from others, or securing leadership in critical brand categories.

Large numbers of brand specialists say that profitable branding goes beyond advertising, one reason for why some companies are leaving their ad agencies to look for new agencies and new partners. While advertising continues to be a key factor in driving brands, the most successful firms see branding as a company-wide, top-to-bottom enterprise. Once handled by "logo cops" who guarded corporate identity, brand building is being rapidly linked to overall company strategy.

"With growing frequency, companies with established brands are abandoning long-time ties with their advertising agencies to search for new partners," says Kay Troy, director of the Conference Board's Global Center for Performance Excellence and author of

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the report. "Other companies that were once content to use brands at the product level are now polishing up their corporate brand. Wanted is the ability to create a brand strategy message, or campaign that will give the company a competitive edge."

The study suggests an emerging connection between successful brand strategies and corporate performance. Total revenue data for 1991 and 1996 obtained from 53 survey participants (23 "high success" firms and 30 others) shows that the median increase in total revenues in the successful brand group was 33 percent, compared with 22 percent among other companies.

The stock value for a typical firm in the successful branding group increased 125 percent between 1991 and 1996, compared with 71 percent for a typical firm in the other group.

The larger the budget for brand building in participating firms, the more likely they are to report that their brand management effort is a success. Although the majority of firms estimated their expenditures to be under \$10 million, almost a quarter reported spending \$50 million or more. Those targeting a business-to-business audience typically spend less than those hoping to reach the larger population of consumers. These expenditures represented between one and two percent of 1996 sales. The study finds that the maturity of a company's brand strategy may be a factor. Almost half of the group who launched their brand strategy prior to 1990 have budgets of \$50 million or more. In contrast, 60 percent of those who initiated a brand strategy in 1995 or more recently are investing under \$10 million.

Corporate advertising is often the largest piece of the budget, and most survey participants expect their advertising expenditures to grow over the next few years. The typical company allocated 20 percent of its 1996 budget to advertising.

The majority of firms identified eight measures as helpful in gauging the success of their corporate brand building: market/share penetration; ability to attract a premium; customer satisfaction; market position; brand leadership; brand awareness; value; and customer beliefs about the brand.

The ability to measure success remains an elusive goal. Only 20 per-

cent of survey participants say they are highly satisfied with their ability to measure results. Firms that are highly satisfied are likely to use a more detailed set of measures to gauge brand building efforts — an indication that this group had moved beyond generalities to probe the nuances that differentiate their brand. The detailed set of measures included: brand personality, customer loyalty, sensitivity to the brand within its category, and brand leadership.

"We have key metrics that span the

full purchase process cycle from initial awareness of the company all the way through customer loyalty and retention," says Ann Redmond of Microsoft. "But we also have a measurement architecture underlying that to assess the fundamentals of building brand equity. For example, we want to know how effective our advertising is, how effective our point of sale materials are, do people remember and internalize our tag line."

In some firms, internal audiences are targets for the brand message. The

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brand creates a strategic platform by embodying the corporate mission and aspirations. The challenge is to unite employees from a collection of diverse cultures around a common goal. Leading firms count "a distinctive corporate culture that serves as a platform for the brand" and "the ability to obtain support from a broad spectrum of employees," among the factors crucial to the success of their brand strategy. Over half of successful firms report that a widespread ability to articulate the brand promise is already in place. This is true for only about 15 percent of other participants. To order a copy of the report ("Managing the Corporate Brand" report #1214-98-RR) call 212-339-0345.

Gen X optimists will propel Internet

The adoption of PCs, new media, and electronic commerce by Gen Xers will play a crucial role in moving the Internet into the mainstream, according to a new report from Forrester Research, Inc., Cambridge, Mass. Drawing on survey data from 120,000

North American consumers, Forrester has identified the technology optimism inherent in each new generation as the driving force behind this trend. Each generation has its technology optimists — the people who adopt and proselytize high tech products. Forrester looked at three generations of optimists — Gen Xers, Boomers, and seniors — and concluded that Gen Xers will embrace and evangelize the Internet as a mainstream technology in much the same way as Boomers have with television and seniors with radio.

"Optimism is what drives technology purchases and Internet commerce; therefore, locating technology optimists is essential for vendors and on-line marketers to succeed," says Meghann MacKenzie, Forrester analyst and author of the report. "Computer, software, and on-line vendors need to tap into optimists' ages and motivations — entertainment, family, and career — in order to predict a life cycle for consumers' technology needs."

The technology optimism of Gen Xers will support several related trends, each of which will contribute to

the mainstream emergence of the Internet. First, Gen Xers will close the gap in PC ownership, catching up to wealthier Boomers thanks to the emergence of sub-\$1,000 PCs. Second, Gen Xers will log on to the Internet in greater numbers than Boomers or Seniors. Forrester's survey data indicates that 82 percent of PC-enabled young optimists already use the Web on a regular basis, compared with 65 percent of Boomers with PCs. Finally, Gen Xers are far more likely to make on-line transactions and to use the Web to for pre-purchase research.

"Over the next few years, Gen Xers, Boomers, and seniors will evolve differently, using the Internet in distinct, specialized ways," says MacKenzie. "The Internet will increasingly become a lifestyle choice for Gen Xers, distinguishing them from Boomers, who will turn to the Internet for time-saving applications that cater to career and family needs. The few seniors on-line will use the Internet primarily for communications and community. To win on-line customers, marketers need to key into these distinctions."

Data for the report was drawn from a survey of 120,000 North American consumers and was conducted with the NPD Group in the fall of 1997. For more information visit the company's Web site at www.forrester.com.

Asian workers' uncertainty varies from market to market

How confident are Asia's employed about their jobs? Findings from a survey of over 13,000 respondents conducted by Hong Kong-based Asia Market Intelligence show different levels of anxiety in 11 markets.

Nervousness about job stability was felt most keenly in Malaysia — 45.3 percent of Malaysian residents claimed they were "very insecure" and "fairly insecure" about their jobs, followed by Thailand at 39.5 percent and Korea at 30.3 percent. Having survived riots, bank closures and a plunging rupiah, Indonesian respondents were suitably unnerved at 29.4 percent. Hong Kong respondents were also affected by the stock market malaise, retail slump and dour economic outlook at home — 20.2 percent were insecure about their



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jobs. Taiwan, virtually unscathed by the economic crisis, may have the most confident citizenry: 33.4 percent of respondents were "fairly secure" about their jobs, while 22.4 percent were "very secure." Philippine respondents were likewise upbeat: 33.2 percent were "fairly secure" about their jobs, while 26.8 percent were "very secure" — a surprisingly optimistic showing given the country's problems in the wake of peso devaluation. Job pessimism, however, has apparently not affected outlook for the future. Only five percent of the total sample expect their personal economic situations to worsen a lot in the next 12 months. Forty-four percent — the majority — expect it to stay the same.

Here are the responses, by region, to the question: "Given the current economic climate, how secure or insecure do you feel about your job?"

Shanghai

Very insecure - 3.7%
 Fairly insecure - 12.6%
 Neither secure nor insecure - 36.2%
 Fairly secure - 17.5%
 Very secure - 5.6%
 Don't know/no comment - 24.3%

Beijing

Very insecure - 4.2%
 Fairly insecure - 12.6%
 Neither secure nor insecure - 40%
 Fairly secure - 11.8%
 Very secure - 4.6%
 Don't know/no comment - 26.7%

Guangzhou

Very insecure - 3.9%
 Fairly insecure - 11.2%
 Neither secure nor insecure - 37.9%
 Fairly secure - 13.4%

Very secure - 5.0%
 Don't know/no comment - 28.5%

Hong Kong

Very insecure - 7.2%
 Fairly insecure - 13.0%
 Neither secure nor insecure - 21.1%
 Fairly secure - 21.4%
 Very secure - 9.9%
 Don't know/no comment - 27.3%

Singapore

Very insecure - 7.2%
 Fairly insecure - 10.5%
 Neither secure nor insecure - 17.8%
 Fairly secure - 26.9%
 Very secure - 27.8%
 Don't know/no comment - 9.9%

Malaysia

Very insecure - 16.7%
 Fairly insecure - 28.6%
 Neither secure nor insecure - 12.7%
 Fairly secure - 19.2%
 Very secure - 12.8%
 Don't know/no comment - 10%

Taiwan

Very insecure - 3.5%
 Fairly insecure - 9.9%
 Neither secure nor insecure - 9.3%
 Fairly secure - 37.2%
 Very secure - 24.9%
 Don't know/no comment - 15.2%

Thailand

Very insecure - 8.4%
 Fairly insecure - 31.1%
 Neither secure nor insecure - 20.5%
 Fairly secure - 26.9%
 Very secure - 12.3%
 Don't know/no comment - 0.8%

Korea

Very insecure - 8.8%

Fairly insecure - 21.5%
 Neither secure nor insecure - 15.4%
 Fairly secure - 14.7%
 Very secure - 3.9%
 Don't know/no comment - 35%

Vietnam

Very insecure - 3.4%
 Fairly insecure - 14.8%
 Neither secure nor insecure - 29.9%
 Fairly secure - 24.0%
 Very secure - 20.9%
 Don't know/no comment - 6.9%

Indonesia

Very insecure - 6.7%
 Fairly insecure - 22.7%
 Neither secure nor insecure - 40.1%
 Fairly secure - 24.8%
 Very secure - 5.4%
 Don't know/no comment - 0.2%

Philippines

Very insecure - 4.8%
 Fairly insecure - 12%
 Neither secure nor insecure - 20.4%
 Fairly secure - 33.2%
 Very secure - 26.8%
 Don't know/no comment - 2.8%

"In the next 12 months, do you expect your personal economic outlook to improve a lot, improve a little, stay the same, worsen a little or worsen a lot?"

Total sample

Improve a lot - 5.5%
 Improve a little - 30.0%
 Stay the same - 44.0%
 Worsen a little - 15.5%
 Worsen a lot - 5.0%

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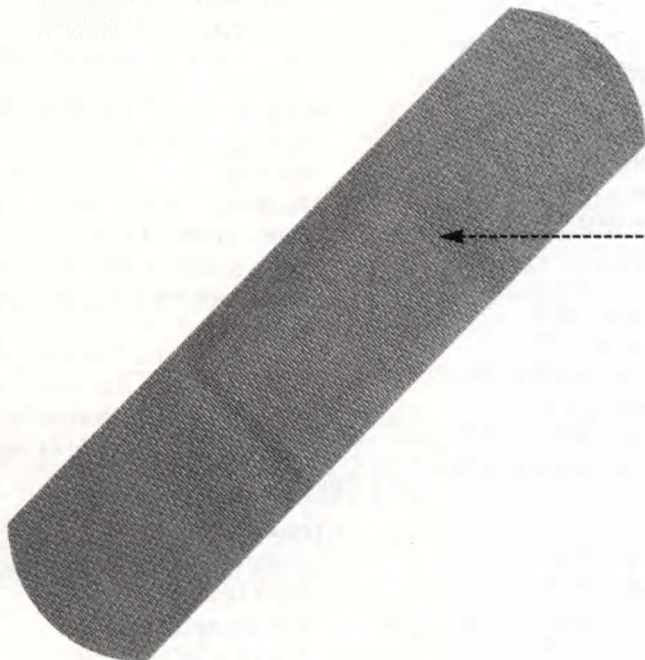
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Product & Service Update

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includes three types of products: Statistical Solutions, tools for basic to very advanced analytic applications; Industrial/Statistical Process Control Solutions, a selection of tools for quality control and improvement; and Enterprise-wide Solutions, enterprise-wide implementations of STATISTICA software.

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Survey expert

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according to the following guidelines. Continue rewriting each question as needed, without altering the original purpose of the questions. Remember to:

- Keep each question simple and single-minded.
- Keep each question as short as possible. If it takes too long to fill out, customers won't return your survey.
- Use understandable and clear language.
- Be specific.
- Do not talk down to the customer.
- Avoid bias.
- Avoid conjectural questions or situations.
- Keep response types to a minimum.

Bear in mind that customers answer survey questions by different scale types (i.e., excellent, good, fair, poor). Most users will select only a few types for any particular survey to limit confusion on the part of customers and simplify the analysis process. Try to keep the number of scale types small, and survey design will remain simple.

C) Survey construction. Once you have determined the type of information needed, the question structure, the word choice and the scale types, it is time to combine the pieces of the survey into a complete document.

Issues that need to be addressed include determining if you want to group any demographic questions together at the beginning or end of the survey and deciding if you want to group the survey questions by topic or mix them up randomly.

If possible, you should have a small sample of customers take a draft survey to ensure that the questions are understandable, and that the survey takes a reasonable length of time to complete.

Step #5: administering the survey

You should consider the options for survey administration early in the design process. Choices include mailing a hard copy (paper) survey; running the survey over a network, your Web site or via e-mail; or proctoring the survey over the telephone. Today's

survey software products typically give you several options.

Hard copy surveys, also known as paper-and-pencil surveys, are easy to administer to people that can be brought together in one place. Where technology is either not available or is intimidating to some of the customers, a hard copy survey is a good alternative. The potential downside to a hard copy survey is the cost and time of data entry to get the survey responses ready for analysis.

Computer-administered surveys can be quick and easy, and eliminate the need for data entry for analysis of answers. In today's world, we are accustomed to electronic communication: e-mail, the Web, an intranet or network. Many customers will find it much easier to respond to your survey on-line. Just make sure that customers are comfortable using a computer so participation isn't lessened because of technology intimidation.

Other questions regarding survey administration include those dealing with confidentiality and anonymity. For some surveys these concerns may

not be large, but for others they will be very important. You need to ensure an open and honest approach to this issue so that the integrity of the survey does not become compromised. Confidentiality and anonymity can be enhanced by explaining to customers the steps that have been taken to ensure confidentiality and anonymity.

For all target audiences, there are good times and bad times to give surveys. For example, don't plan to administer a survey during the last week of the quarter crunch if you want to reach marketing executives. If you are doing a phone survey, when will potential customers most likely be available?


Finally, don't forget to tell customers the date their surveys must be completed. Some organizations use a small incentive (a coupon for a product or service, even a dollar bill) to increase participation.

Step #6: compiling the data and analyzing the survey responses

It is time to gather the data and

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understand what the customers have told you. There are four sequential steps to this process.

1. Analyzing the answers of all customers. You usually want to see first how the total population of customers answered your survey questions. Some survey software products allow you to complete this step with a few keystrokes; others may be somewhat more complicated. If you have done a relatively lengthy survey that covers several topics, you will probably want to look at topic averages in addition to responses to the individual questions.

As you do your analysis, keep in mind the many statistical measures of dispersion and central tendency. Will the mean be enough information or will you need to know the standard deviation of the responses? Will you need the percentage breakdown of each response? Ask yourself what would be meaningful to you and your customers. Think about the level of statistical understanding of the client and the customers.

2. Analyzing subsets of customers. Once you know how the total population answered, you will want to look at how subsets of the population responded compared to the total population. How did men answer

compared to women? How did people in the 45–54 age group respond compared to those in the 35–44 group? What quality issues are reported by first-time purchasers of your product? Knowing this kind of information helps you provide better products and services, identify new markets or respond to operations problems.

3. Analyzing by topic or question. Sometimes you will want to know how a total population or a subset answered a specific question: “How many times in the last decade have you bought a Ford?” You can examine the breakdown of the customers not only by frequency but also by demographic category. Good survey software should allow you to analyze your data in many ways.

4. Graph the analysis. The ability to present data in easy-to-understand graphic formats is important. Charts and graphs allow you to see and understand the data quickly. Ultimately this may help you communicate valuable information to key executives and members of the marketing and creative teams.

Step #7: preparing to communicate survey results

As we stated above, it is important how you communicate the results of the survey to your boss, department

or client and, depending on your agreement, to the customers who participated in the survey. Communicating the results to customers reinforces that their input was used.

Successful communication requires a consistent and persistent plan. Most organizations use a variety of formal and informal communication methods that suit their culture, such as newsletters, e-mail, and meetings. Customers, suppliers, employees and other groups may require different forms of communication.


Step #8: creating action plans

The point at which surveys prove their value is when the information you have gathered is used in a constructive way to improve operations, products, programs, creative, offers, etc. Developing an action plan helps implement those improvements. An action plan should include:

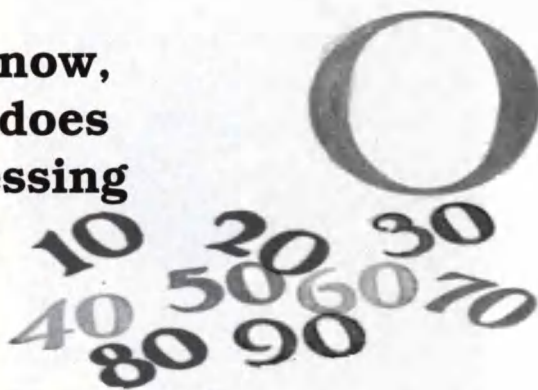
- An evaluation of survey data and consensus of what action needs to be taken, and with what priority.
- A listing of activities that need to be carried out for each priority item.
- The names of the people responsible for implementing the plan.
- A timeline for each plan’s accomplishment.

Once you put the action plan in place, it is important to periodically re-visit the plan. Be sure that the work is getting done. At some point, you can conduct the same survey again and evaluate if the areas identified as action items are actually improving.

Planning and commitment

Successful customers surveys require planning and a commitment from all parties involved. By following these eight steps you can make the process of designing, administering and analyzing surveys a positive one. In the end, you will obtain valuable and desired information from your customers that may be used as the foundation for major change within your company. These steps will hopefully make your job less stressful and your life a little easier. 

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Seven fears

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methodologies available to market research professionals that help minimize costs. Such tools range from small-scale qualitative studies to soft-soundings with industry opinion drivers and analysts. Generally, a detailed demographic breakout of the results necessitates a more expensive research program. However, most

Before conducting any kind of research program, managers must convince their superiors that the program has merit. For those who are not well versed in market research techniques, selling a new research program to senior management is a daunting task at best.

marketing issues can be addressed with a modest commitment of resources.

Fear #3: It's difficult to sell research projects to superiors.

Before conducting any kind of research program, managers must convince their superiors that the program has merit. For those who are not well versed in market research techniques, selling a new research program to senior management is a daunting task at best. Some executives feel that failure to win over

superiors will lead to diminished credibility with their colleagues. Fair enough. But what about the loss of credibility associated with slow sales growth due to a poorly planned communications program?

Research programs are best sold to management as one of two basic categories. The first, called proprietary research, is conducted for a company's internal purposes at its own expense. Also referred to as strategic or tactical research, this kind of research yields actionable results that help managers make decisions concerning marketing and sales programs. If it is determined that strategic research would best serve the utility company, a cost-benefit approach helps managers demonstrate to their superiors how the research will contribute to the bottom line.

The second type of research is publicity-driven research or "research for ink." This kind of research is designed to generate favorable publicity by providing insight into a strategically important issue or topic. If publicity-driven research is best suited to a specific company issue, "soft-soundings" with informed journalists and analysts will provide an excellent indication of editorial interest in the intended research topic. The documentation of such interest is an important component of selling the

research program to management. Superiors listen to educated proposals.

Fear #4: How do I conduct market research?

Many marketing managers are reluctant to organize strategic research proposals because they are inexperienced in the medium. If this is the case, it is time to enlist the aid of an in-house research professional or a market research firm. The majority of utility executives lack the training necessary to design a research program. Both *Quirk's* and the American Marketing Association, however, publish directories that list hundreds of firms in the United States that are capable of addressing a utility company's market research needs. In addition to asking for references from such firms, management should explore the type of affiliations the firm has had in the past. Hire the firm that understands your company's agenda.

Fear #5: Market research takes too much time.

Concerns about convergence and marginal competitive advantages dominate the utilities industry. Pressure to respond quickly to changing market conditions limits the amount of time communications pro-

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professionals can devote to a given product launch or service announcement. This pressure to keep up with the competition shortens the time marketing managers have to design communications programs. The result? Utility companies frequently eliminate market research initiatives that are perceived by management to be superfluous and time intensive.

But when the time comes to make an important business decision, it is critical to conduct research to confirm that decision. Even start-up companies with fast production cycles and limited resources should take time to confirm business strategies prior to implementation. Doing so prevents costly mistakes before companies invest time and manpower on the project. Avoid acting in haste and repenting at leisure.

Fear #6: Market research can yield unfavorable results.

No executive wants to learn that the hot new technology being developed does not address customer needs. While unfavorable research results

will certainly put a dent in a manager's day, they are in his or her best interest over the long term. Poor results allow utility executives to proactively identify and eliminate problem areas before they come to the attention of senior management. It is in any manager's best interest to capitalize on research results rather than working without the benefit of market knowledge, further committing company's reputation to a project that is off-strategy. Research results, whether favorable or not, inform and empower managers.

Fear #7: I'm unsure when market research should be used.


Lack of knowledge regarding when to use market research is the easiest fear to overcome. Market research should be utilized whenever a business needs to make a decision where the stakes are high. When counseling clients in challenging marketing situations, research professionals should advocate placing a dollar value on the cost of failure and then weighing it against the benefits

of success. This exercise provides any management team with the perspective to assess the long-term impact the decision will have on the

Market researchers need to make it clear to managers how research contributes to strategic decision-making. Without this understanding, utility companies will continue to relegate market research to the realm of the superfluous.

company's future. Research should be conducted before making major business decisions.

Overcoming the fears

Market researchers need to make it clear to managers how research contributes to strategic decision-making. Without this understanding, utility companies will continue to relegate market research to the realm of the superfluous. Many executives at utility companies are unaware that market research can provide reasonably priced answers to their most complicated questions. By allowing businesses to take risks on paper rather than in the marketplace, research minimizes the risks associated with a project. After fine-tuning business strategy in this way, managers can make proposals to their superiors with confidence. 

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Data Use

continued from p. 19

options for cutting and pasting, depending on the target program for the output.

Version 7.0 introduced the pivot table as a new form of SPSS output.

GENDER Gender M, F, U * CENSUSA4 census 4 regions * ANYGE18 any kids 18 & up Crosstabulation

ANYGE18 any kids 18 & up	GENDER Gender M, F, U	CENSUSA4 census 4 regions					Total
		.00	1.00 Northeast	2.00 Midwest	3.00 South	4.00 West	
00 N	F	64	847	25	13	1134	1236
	M	847	476	1691	2816	1018	6851
	U	809	635	1804	3054	1329	7562
	Total	7967	7554	20344	29159	15649	80572
1.00 Y	F	25	14	88	98	19	64
	M	53	2	71	151	92	344
	U	229	318	879	1185	611	3223
	Total	335	354	1036	1435	761	3603

GENDER Gender M, F, U * CENSUSA4 census 4 regions * ANYGE18 any kids 18 & up Crosstabulation

CENSUSA4 census 4 regions	ANYGE18 any kids 18 & up	GENDER Gender M, F, U				Total
		F	M	U		
.00	.00 N	64	847	839	7567	8116
	1.00 Y	25	53	27	229	335
	Total	89	900	866	7796	8451
1.00 Northeast	.00 N		476	635	7554	8665
	1.00 Y		14	2	318	334
	Total		490	637	7872	9000
2.00 Midwest	.00 N	25	1691	1804	20344	23865
	1.00 Y		88	71	879	1036
	Total	25	1779	1875	21223	24901
3.00 South	.00 N	13	2816	3054	29159	35044
	1.00 Y		98	151	1185	1435
	Total	13	2914	3205	30344	36479
4.00 West	.00 N	1134	1018	1229	15649	19330
	1.00 Y	38	19	92	611	761
	Total	1172	1037	1321	16260	20091
Total	.00 N	1236	6851	7562	80572	96221
	1.00 Y	64	272	344	3223	3803

Figs. 2a and 2b: two pivoted views of the same output.

Version 7.5, which we last reviewed, seemed mostly concerned with getting these new tables to work more flexibly, and otherwise enhancing and cleaning up its earlier series 7 sibling.

Pivot tables probably are familiar to anybody who has spent much time with Excel, Quattro Pro, or Lotus 1-2-3 in those programs' more recent incarnations. In a pivot table, you can swap rows and columns simply by selecting the appropriate output and the correct command from a menu. If you happen to have a table with "nesting" (headings within headings), you can change rows, columns and nestings within each.

You may not need to do such fancy maneuvering often — or ever, for that matter — but now you can. Figs. 2a and 2b recall our original review. They show two pivoted views of the same data. In an attempt to keep the level of detail somewhat sane, the tables show only counts (or the number in each cell). If you were to choose any extra in-cell statistics, these too would also get pivoted instantly.

Getting closer to version 9.0: Smart Viewers and other things we missed from version 8.0

As the subheadline mentions, by the time SPSS 9.0 came out, we'd missed our chance to review SPSS 8.0. In that version, SPSS added more flexibility to its graphics, reorganized and expanded the program, and renamed the program, and renamed the program, now called the Smart Viewer. With this, you could send output from the program directly along to other people — or, in its largest version, to have them look at the output on the Web. It is all in its native SPSS-output format, and you can use SPSS Viewer features, like changing tables of numbers directly into charts. (Note that Smart Viewer requires that you pay a fee for each user who receives your output, and the Web server is a major expense — more about this later.)

Smart Viewer is true to its name to the extent that it allows people to look at various views of statistical output but not to go back to your original data and fool around with it. However, anybody armed with the Smart Viewer could push and pull around any output

you sent them, pivoting tables, "drilling down into the data," and generally getting themselves completely dizzy.

Your reviewer understands that the idea of distributing and sharing data, even analysis of data, is considered a noble cause in many quarters. Some go so far as calling this practice "empowering your users." In fact, we now have a new mysterious acronym that describes this well-meaning idea, OLAP, or on-line analytical processing.

As many of you already know, though, we need more than good intentions to survive. Smart Viewer does an excellent job of distributing tables in electronic format, and even your reviewer thinks that is a fine idea. At least, it is for those tables that come with statistical testing on them. A surprising amount of SPSS output still comes without statistical testing anyplace on it, in particular from the SPSS Tables module. (This module, by the way, remains as it was in Version 8.0).

It's just the thought of giving all and sundry a mass of non-annotated data analysis to "play with" that leaves me less than satisfied. For instance, look at Fig. 3. Which differences are signif-

Kardboard Krunchies: Purchase Behavior and Intentions, Pre-Promotion and Post-Promotion

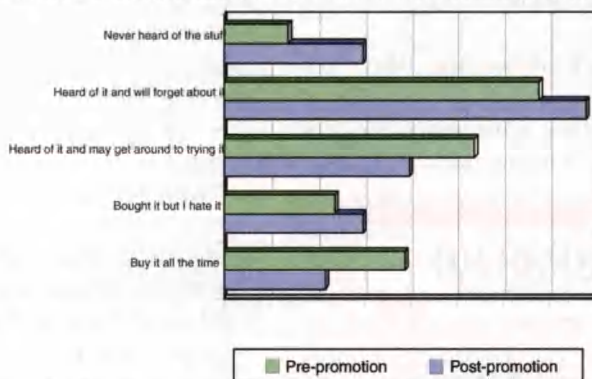


Fig. 3

icant at the 95 percent confidence level? Which are not quite significant, but "directional," at the 80 percent to 94.99 percent level?

We have independent samples of 510 and 300 respectively, and data were analyzed in the form of one large pre-to-post crosstabulation, using the adjusted standardized residual test available in SPSS crosstabulation procedure.

The correct answers are: significant increase for “buy it all the time,” significant decrease for “never heard of the stuff,” and “directional” increase for “heard about it, may get around to trying it.”

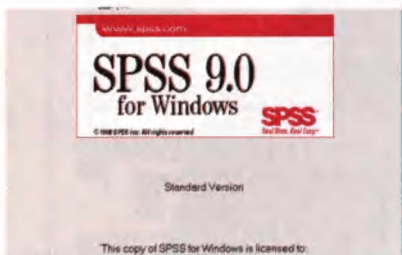
As you can see, the procedures for doing the analysis, and their output, are not getting any easier to understand. Whoever analyzes the data needs to include ample instructions about interpretation, and many reminders about staying somewhat reasonable in using the output. This need is increasing all the time.

However, the SPSS Viewer does not yet match any of the major presentation packages, or spreadsheets, or word processors, in making a well-formatted explanatory and interpretive document. Here are the questions that distributing data analyses raise for me: Would the people who need to apply the data understand the unvarnished output from a factor analysis, a discriminant analysis, a one-way analysis of variance, etc.? Or even our adjusted standardized residuals, as were used in the example?

I suppose some utopian community exists somewhere where all involved can interpret things like these. Would somebody please tell me where to find it? I’m ready to pack my things and move there immediately.

Now, without further delay, SPSS 9.0

SPSS 9.0 is a major upgrade of the program, bringing with it a host of



new and useful features. It also brings some bad news, in that you will most likely need to buy more program pieces, or modules, than you did in the past to get all this newly added power.

Leading among the good-news items is that SPSS can now do multinomial logit (MNL) — or more pedantically, polytomous logit — and so can be used to solve problems in discrete

choice modeling. This new capability is part of a new Regression Models module, which replaces the old Professional Statistics module.

Chief among the bad-news items is

procedures. The newest of the new appear in the table with a check mark (like this ✓). These are only highlights; you can find full details at www.spss.com/software/spss/spss90/s

Table 1: What's Inside SPSS 9.0

Name	Module							
	Base	Regression Models ✓	Advanced Models ✓	Tables	Categories	Trends	Conjoint	Missing Value Analysis
What It Does	Summary statistics	Multinomial logit ✓	Advanced General Linear Model	Tables	Optimal scaling	ARIMA and other trends models	Conjoint analysis	Infer missing values from other data
	Crosstabs	Non-linear regression	Repeated measures		Correspondence analysis			
	ANOVA and t-tests	Weighted least squares	MANOVA		Multidimensional scaling			
	Correlations	Two stage least squares	Cox regression		Non-linear canonical correlation			
	Linear regression	Probit	Hiloglinear					
	Non-parametric tests		Survival analysis					
	Curve fitting							
	Factor analysis							
	Hierarchical clustering							
	K-means clustering							
	Discriminant analysis							
	Proximities							
	Matrix language ✓							
Data management and transformation								

that conjoint analysis now has become its own module, separate from the rest of “Categories.” If you want to use SPSS to do both conjoint and correspondence analysis, for instance, you will now need to buy two modules. (Actually, this happened in Version 8.0, with anyone who had an earlier version of Categories getting the conjoint module free. Since we missed reporting on the Version 8.0 upgrade, this has to pass for news in this review.)

Disappointingly, but not new to Version 9.0, to do repeated-measures analysis of variance, you must get the Advanced Models module, which replaces Advanced Statistics. As a reminder, you need to use repeated measures analysis of variance where the measurements are done repeatedly over time among the same group. (This requirement of a module in SPSS is quite different from the situation in SYSTAT, where if you want the analysis to be treated as repeated measures, you just check the appropriate box on-screen in the analysis of variance routine.)

Table 1 shows a run-down on what you will find in SPSS 9.0, and which parts include major revamping or new

peccs.htm.

In short, SPSS now provides almost all the data analytical power needed for anybody involved in practical decision-making, whether in market research, marketing, corporate planning or other areas. As always, it does an exemplary job of covering the basics, with exceptionally good data management and transformation capabilities. Its addition of polytomous logit — or as most people prefer, multinomial logit (MNL) — models fills the one major gap it had in its analytical procedures.

Incidentally, don’t feel too bad if some of the terms in the table above are not familiar to you. In the data analysis community, methods gain followings among small groups. For instance, every now and then, you will run across somebody who tells you that two-stage least squares will answer all of humanity’s problems. In response to this, I suggest that you nod your head sagely, and then ask if you can view this great seer’s yacht. The quality of the response to this question should prove how much real-world application this “unique method” really has.

SPSS also sells a host of companion products that we will not have a chance to review here. These include but are not limited to:

- allCLEAR for process analysis;
- AMOS for path analysis and structural equation models;
- MapInfo for the geographical display of data;
- Neural Connection for neural networks;
- SPSS Diamond for visual exploration of complex data relationships;
- Trial Run for generation of experimental designs.

As this suggests, SPSS is moving far beyond the basics and into some specialized areas. It will be quite interesting to see how SPSS responds to changing tastes in market research's data analysis community. SPSS, for instance, does not yet have modules for Latent Class Analysis or Gibbs Sampling. By the way, both of these methods are gaining some adherents as solutions for getting individual-level data, or grouping people based on their responses, based on multinomial logit analysis. (At least, these methods are heating up some interest among the approximately 0.017 percent of the data analytical community that cares about such things.) Modules or procedures for doing either in a program like SPSS likely would be all that's needed to gain either procedure much wider acceptance.

Finally, as is always the case with SPSS, release 9.0 seems solid and remarkably free of bugs or operating problems. Here, though, you should note that many bugs are specific to certain combinations of hardware and software that may exist on a system. As such, it is not possible for your reviewer to know where you may have a potential problem area on your computer. SPSS takes a very serious attitude toward any problems you may report, which places them miles ahead of many other software and hardware companies. One of the nicest things about SPSS is this knowledge that — in the rare instance that the software bogs down on you — you can pick up the phone and get a serious investigation and response from technical support.

Statistical programs vs. spreadsheets

This section is here mainly for those of you who are not feeling too clear about the differences between statistical analysis programs (like SPSS and SYSTAT) and the spreadsheets (like Excel, Quattro, and Lotus 1-2-3).

In brief, you will get far more from a program like SPSS if you need to find the relationships between many variables or sets of data items. In particular, the statistics programs do the best job at finding what sets of variables have in common, and how sets of variables predict (or explain) another variable or variables. Providing you have some ideas about what you need to do, even the most powerful spreadsheet will not approach a program like SPSS in these areas. Using the statistical analysis program, then, you can find complex interrelationships in data that will elude the simpler forms of analysis available in spreadsheets.

Spreadsheet programs like Excel have their set of distinctive strengths also. All the major spreadsheet programs make sensational-looking tables and forms, although the gap between spreadsheets and statistical programs is narrowing over time.

Perhaps most impressively, spreadsheets like Excel generally have a built-in programming language that allows their spreadsheets to become programs, complete with menus, controls, and so on. The language that underlies an application like Excel, Visual Basic, is pretty much an industry standard, and has plenty of features — even for mid-to-top-level programmers.

SPSS 7.5 moved closer to Excel in the area of generating programs with the inclusion of a new "scripting" feature. This feature allowed you to build customized routines in SPSS that automate analyses and displays. In version 9.0, SPSS has included a new matrix-based programming language. While this is stronger than the old "scripts," SPSS still does not match a program like Excel in ability to make truly customized displays — up to and including interactive ones, like "real time" market simulation programs.

Overall then, I often find Excel useful to format results farther than I can in SPSS, or to create small programs based on analyses conducted in SPSS. The basic analytical power comes from SPSS. The final integration into findings that will get applied, and the final programs that apply the findings, still largely rely on the spreadsheet — or the spreadsheet's companion presentation software package, such as PowerPoint.

SYSTAT 8.0 for Windows

For many years, SYSTAT and SPSS competed with each other. Then, not



too long ago, they merged. Some people, in particular loyal SYSTAT users, watched with concern. Some wondered whether SYSTAT would even continue as a program in its own right, or whether its "best" features (not necessarily based on their opinions) would simply get folded into SPSS.

Several years later, not only do concerns about the demise of SYSTAT

seem premature, but the program is flourishing. This is one of those cases where all the outcomes were happy, at least from the user's point of view. SPSS has incorporated many good features from SYSTAT, and SYSTAT has now adopted a much more integrated graphical interface, like the one used by SPSS. Whichever program you prefer, each has improved.

Interestingly enough, although SPSS, Inc., now identifies SYSTAT as a "scientific" product, it by no means is a simple duplicate of the flagship SPSS program. Since both SYSTAT and SPSS are full-featured programs, they overlap in most basic areas — but beyond this, each remains highly distinctive.

SYSTAT has always had a certain reputation — again, at least among

those who care — that differentiates it from SPSS. SYSTAT was always more compact, sometimes (but not always) offering a few less options than SPSS, and somewhat more idiosyncratic in its look and feel. The SYSTAT manuals had a well-founded reputation for a style that is both clear-headed and (for statistics) lively. SYSTAT also had a reputation for being a step or two ahead of SPSS in its graphical output, and a step or two behind in its other output.

Of the two, SYSTAT clung more closely to its “command-line”-based heritage. For those of you who can’t — or won’t — remember this, way back in the bad old days, statistics programs expected a lot of typed commands, and gave their poor users little on-line help in getting this right. SPSS, starting as it did before 1970, went through a long time like this.

Way back then, you simply:

- referred to the several-thousand page reference manual on command syntax;
- wrote everything down a few times;
- submitted a batch job; and then
- waited for the thousands of error messages due to your forgetting a comma or period someplace.

Incidentally, when you got the sacred error sheets from the technicians running the real big computer, invariably only the first error would have any meaning. All the rest would be completely inaccurate because the first error threw the program off entirely. (Don’t complain about this story or I’ll tell you about having to use punched cards to submit data and analysis.)

Beyond this, SYSTAT always has had its own set of features distinct from those of SPSS. Even in the procedures they had in common, SYSTAT always had something slightly different to offer.

All of these differences persist, at least to some extent, in the current versions. For these reasons, I’ve always seen these programs as complementary, rather than as strict replacements for each other. If you get both programs, you should find your data-analytical needs extremely well covered. Procedures that SYS-

TAT has that are not in SPSS include the following, in no particular order:

- Bootstrapping of error estimates. This procedure is really an add-on to many other procedures in SYSTAT, and allows you to get accurate readings on the error in estimates where this was not formerly possible.

Most notably, bootstrapping can provide the standard errors of coefficients from multinomial logistic regression. This makes bootstrapping a very useful option for analyzing discrete choice modeling problems. (For the more statistically inclined readers, bootstrapping works better than the — perhaps — more familiar Wald tests for the coefficients of non-linear models.)

You also can use bootstrapping to estimate the standard errors of medians, the standard errors of Spearman correlations, and the standard errors of regression coefficients where predictors are highly intercorrelated.

Bootstrapping as implemented by SYSTAT actually includes three related estimating procedures, more correctly called jackknife, simple replacement, and (finally) bootstrap. These procedures determine errors empirically, with calculations based on drawing many subsamples or subsets from the data set.

Since you run bootstrapping procedures hundreds or thousands of times to get the required estimates, plan to leave a little extra time for it. You probably will want to wait until just before lunch — or better, a few minutes before quitting time — to turn the computer loose on this type of problem. (A few years from now, though, if computer speeds continue increasing as they have been, you’ll probably get this all done while you have a cup of coffee.)

We should note that SPSS has bootstrapping as a feature in non-linear regression, but this is not a procedure that can be used in many places, unlike the bootstrapping in SYSTAT.

- Conjoint analysis that probably differs strongly from what you would expect, and that certainly differs from the conjoint module in SPSS. This is actually a general-purpose modeling program that will fit additive models to data that you cannot measure with

more specialized conjoint models.

You can fit trade-off models, for instance, to data that does not come from experimental designs. This program can address the question of whether this type of model could fit, once you have data that was not collected with a standard conjoint procedure. As such, it could work as a useful supplement to the standard conjoint methods more familiar to many of you.

- Path analysis with a special and powerful module, called RAMONA. This is part of the main SYSTAT program, not an add-on module, as the product AMOS is for SPSS. (Both RAMONA and AMOS are fancy acronyms, of which we will spare you any explanation.) AMOS has a more graphical, Windows-like interface than RAMONA, but both programs pack ample analytical power. All you need is the faith that you can specify the many “latent,” or hidden, relationships required in these models, and you will be ready to go with either program.

- Spatial statistics including such esoteric methods as 2-D and 3-D variograms, kriging, and Voroni tessellations. Now, you may never have heard of these things, but rest assured that SYSTAT here lives up to its reputation, giving you a tremendous amount of graphical display power. Its graphics manual is itself a tour de force, starting with a discussion of cognitive science and graphic design, and taking you through a remarkably informational tour of the many ways in which data can become graphs or charts.

New output organizer

One of the best pieces of news about SYSTAT is that it now handles output much more like SPSS. You see all the results organized into a two-window display, with a tree-like panel to the left, showing where you are in the analysis, and a right panel showing the details of the analysis.

As does the SPSS Viewer, the SYSTAT Output Organizer allows you to move quickly anywhere in the output. Selecting any item in the left-hand side of the Output Organizer automatically scrolls the output to the

Not-to-be-Missed Highlights of

March 15-17, 1999

The New York Hilton Hotel and Towers



The 45th ARF
Annual Convention
and Research Infoplex

Accountability NOW! The NEW Marketing Contract

Monday, March 15

Leader's Agenda General Session

Philip Guarascio, *Vice President and General Manager,
North American Operations Marketing and Advertising*
GENERAL MOTORS CORPORATION
Robert B. Levin, *President, Worldwide Marketing*
SONY PICTURES ENTERTAINMENT
Peter Stringham, *Chairman and CEO*
YOUNG & RUBICAM NORTH AMERICA
Greg Blonder, *Entrepreneur in Residence*
AT&T VENTURES

President's Reception

with live auction to Benefit St. Mary's Foundation for Children

Tuesday, March 16

State of the Industry General Session

Employment Trends
Gerald Kanovsky, CAREER CONSULTING GROUP, INC.
The ARF Study Among CEOs
A. Dawn Lesh, A. DAWN LESH INTERNATIONAL
Emerging Research Trends: A New ARF Study
Robert S. Duboff, MERCER MANAGEMENT CONSULTING
Spotlight Issue: Researchers, Respondents, and Privacy
Dr. Alan F. Westin, *Professor Emeritus of Public Law
and Government - COLUMBIA UNIVERSITY and Editor and Publisher -
PRIVACY AND AMERICAN BUSINESS*

Tuesday Luncheon

with Scott Pelley, *Chief White House Correspondent - CBS NEWS*

Optional Ogilvy Awards

Black Tie Dinner at The Supper Club

Wednesday, March 17

Three Concurrent Forums:

1. Online Advertising Effectiveness

Lynn Bolger, APL DIGITAL
Rex Briggs, MB INTERACTIVE
Caroline Eichman, Ph.D., IBM CORPORATE INTERNET PROGRAMS
Dan Coates, *Burke, Inc.*
Tom Buehrer, E-VALUATIONS RESEARCH
Catherine Ward, MICROSOFT INTERNET MEDIA GROUP
Marianne Foley, IPSOS-ASI INTERACTIVE

2. Gambling to Win:

American Consumers in 2010

Gary Wright, THE PROCTER & GAMBLE COMPANY
Ryan Matthews - FIRST MATTER, LLC
Chris Ertel - GLOBAL BUSINESS NETWORK

3. Advertising Effectiveness -

New Answers to Three Critical Questions

William H. Moulton - IPSOS-ASI, INC.
Steve Schmidt - AC NIELSEN U.S.
David W. Stewart - UNIVERSITY OF SOUTHERN CALIFORNIA
Rosi Ware - MILLWARD BROWN INTERNATIONAL

Wednesday Luncheon

with Valerie B. Ackerman, *President*
WOMEN'S NATIONAL BASKETBALL ASSOCIATION

The Great Debate General Session - The Death of Mass Marketing

Moderator: David V. Spangler - LEVI STRAUSS & COMPANY

Don E. Schultz - MEDILL SCHOOL OF JOURNALISM, NORTHWESTERN UNIVERSITY AND AGORA, INC. and Michael Duffy, - KRAFT FOODS **VERSUS** Erwin Ephron - THE EPHRON CONSULTANCY and Branch Watkins - HUNT WESSON, INC.

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corresponding results in the right window. SYSTAT also offers you the capability to reorder output by dragging Organizer entries to new locations, and to delete output by deleting its entry from the Organizer.

Part of the Output Organizer is a new integrated command window. In

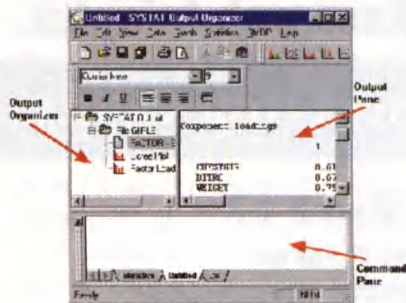


Fig. 4

SYSTAT up to version 7, users interactively entered commands in the Main window. Command files were created and submitted using the command editor. The command editor also served as a log of the commands used in a SYSTAT session.

True to its command-line heritage, and the tastes of many of its users, SYSTAT by default keeps a window for entering commands open and ready for use. You can unlock and resize the command window to increase the space available for output. The command pane has three tabs, and the contents of any of them can be saved to command files for later editing or submission. In case you are now entirely confused about this set-up, Fig. 4 should give you some idea of how output and commands are organized.

In the command pane, the first tab (Interactive) acts as an interactive command processor. Commands are processed as they are entered, with output generated by "hot commands" (as you can see, statisticians take a hot time as they find it).

The middle tab (Untitled) now serves as the command editor. You can type a series of commands directly on this tab, and then submit the resulting file in "batch" mode. You can submit the entire tab, or select a portion for processing.

The Log tab serves as a record of all commands issued during a SYS-

TAT session. This tab is kept as "read-only" by SYSTAT, so you cannot type over it and change it inadvertently (or "advertently," for that matter).

Traditionalists will be glad to hear that statistical results can appear as either formatted or unformatted tables. Those who have to have unformatted output (ASCII text) need only type CLASSIC ON in the Command pane or select "Use SYSTAT Classic output style" from the "output" tab on the "options" dialog box. Similarly, typing CLASSIC OFF makes all subsequent output appear in its nicer, default format.

SYSTAT remains a leader in value

The entire SYSTAT program comes as one package, for a single price. It allows you to do nearly everything that you can with SPSS and several add-on modules for that program, at a substantially lower price. Here are the two notable exceptions in SYSTAT's otherwise formidable armamentarium of methods:

- It does not provide the full range of classification tree methods, but rather uses a program called C&RT, which does only two-way splits, or bifurcation. C&RT has many highly sophisticated tree-growing features, but its inability to do many-way splits rules it out as a first choice for your reviewer. If you use only two-way splits, you can miss highly important predictors that appear only when the sample is split into three or more subgroups at once.

However, any classification tree program is far better than none. Therefore, if your budget cannot stand both a full statistics package and the SPSS AnswerTree program (which we discuss next), then by all means consider SYSTAT with its built-in C&RT module.

- SYSTAT does not perform conjoint analysis as it is commonly defined in marketing research and related disciplines. (This of course assumes that we can use the term "discipline" in connection with any of these activities. You be the judge.) Anyhow, SYSTAT does not perform

the analysis that you may already know and love, which includes the generation of an experimental design, creation of "product profiles" for testing, and analysis of the results. (SYSTAT can design experiments but cannot generate profiles with different numbers of levels for the various attributes tested. As such, it would be only partially useful for generating the types of designs usually used in conjoint analysis.)

Nonetheless, if you do not need SYSTAT to do either of these forms of analysis, it is an extremely powerful piece of software with a remarkable range of features. Its impressive powers are neatly reflected by its main statistics volume, a command reference running to some 1,086 pages.

Again, if your budget can afford it, and you are at all serious about analyzing data, you really need to have both SPSS and SYSTAT up and running on your system.

AnswerTree 2.0: a much-needed classification tree analysis program

SPSS has rushed to the rescue of data analysts everywhere with its release of AnswerTree 2.0, by provid-



ing a good and powerful program for classification tree analysis at a price that will not make you faint.

Unfortunately for those unfamiliar with this method, space doesn't allow us to explain classification tree analysis here. However, if you keep an archive of *Quirk's* magazines, you can find an introductory description in the November 1995 issue. Those of you who sinfully threw out this issue (or less sinfully never had it), and have access to the Web, can find the text of this article in the Article Archive at the *Quirk's* Web site. The Web address is www.quirks.com and it is a nice place to visit anyhow. (Note: this last comment is really the author's and not his editor's!)

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AnswerTree by SPSS particularly welcome, following closely on the near-demise of the program that used to lead the pack, KnowledgeSeeker. We last reviewed KnowledgeSeeker in 1995, when the software's bugs were tolerable. In later versions, the bugs got larger and more numerous, actually undermining the integrity of the program.

Since then, it was acquired by a company that focuses on "enterprise-wide solutions" (which is software industry language for "obscenely expensive programs"), rather than on fixing the problems in their software. This company took a program that worked well, if somewhat slowly, and made it speedier, while more awkward, and much less reliable — and raised its price from \$995 to \$4,620.

KnowledgeSeeker lives on at the same place, with its new exalted price point, and without the needed bug fixes. If you want the product without bugs, as I understand it you need to move up to the still pricier and more comprehensive KnowledgeStudio (which, I believe, you can have for something about \$9,950).

In any event, I think most of you will agree that, after that preamble, it seems quite reasonable of SPSS to charge only \$995 for AnswerTree. AnswerTree in fact offers more analytical options than KnowledgeSeeker, and produces very pretty — if inflexibly formatted — displays in the bargain.

A wealth of analytical options

AnswerTree offers four main analytical methods, including CHAID, exhaustive CHAID, C&RT (of SYSTAT fame), and Qwest. These last two methods are limited to bifurcation, as discussed earlier with C&RT (just about when your eyelids were getting heavy). This analytical limi-

tation leaves them as interesting, but not first, choices.

Unless exhaustive CHAID blows up your computer (which it has not yet done for your author in AnswerTree's implementation), it likely will become your method of choice. This exhaustive method does not stop once it finds what appears to be an "optimal" split based on any variable, but goes on and tests all other possible combinations. As a result, it almost always finds more ways to split the sample, and better ways, than standard CHAID.

Several steps from becoming a "killer application"

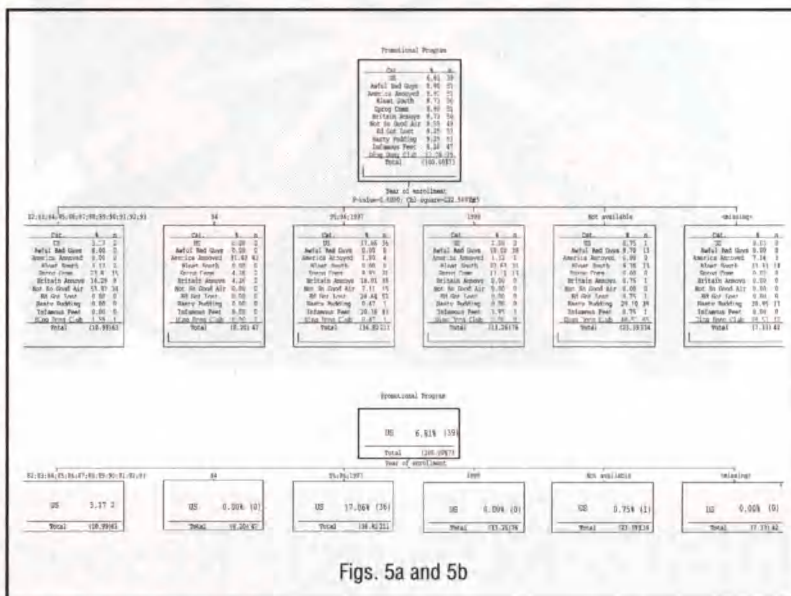
AnswerTree 2.0 is really an excellent program overall. Its analytical strengths are immediately apparent. The only areas in which it needs more work are in handling the tree

some success in handling the file (i.e., allowing me to open and edit the diagram). PowerPoint chose to keep the exported image life-size, rather than shrink it to the page, which is good, as the file came with a useless "background" that was some 110 by 200 inches at this scale. This mass needed to be deleted, but very carefully, as it was linked with several needed parts of the diagram.

Other programs, all of which tried to get the diagram onto one page, left the tree diagram as a minuscule mass squeezed far into one corner. Trying to expand the diagram to something actually visible left it a horrible mess, with the labeling text either absent or scattered at random locations.

Even with PowerPoint, which almost always accepts and converts any other image, the charts (which can appear at each point in the tree diagram) did not make the transition. I hope SPSS will deliver a solution to this diagram-pasting problem soon.

In fact, those working at SPSS only need look at the old KnowledgeSeeker 3.1 to see how this is done. Incidentally, that older program included many other nice little



Figs. 5a and 5b

tricks that SPSS could incorporate here as well. It's a shame that programmers seem not to look at others' work to learn how they could improve their own. This phenomenon of not learning from what others have already done is widely known in technical circles as the "NIH" (or "not invented here") effect. That is, "If we didn't make it, it can't be good."

Beyond this basic problem in pasting, you cannot set which elements appear at each point in the diagram, except to say that you want the full explanation, or the same with a graph attached. (Since the graphs

Group Definition	Individual Group Statistics						Cumulative Statistics		
	Group I.d. (node number)	Size of group	Perce- tile	Number of Responses	Response Rate	Group Lift or Leverage	Cumulative Responses	Cumulative Rate	Cumulative Lift
Gender: M	21	752	98.1	60	8.00%	320	60	8.00%	320
Credit Line: \$400 up to \$5500									
Census 4 region: Northeast South									
Percent Black: Up to 99%									
Age: 26 up to 48									
PRIZMA Code: 26 up to 62	18	721	96.3	41	5.70%	228	101	6.90%	275
Percent White: Up to 91%									
Age: 20 up to 26									
Leverage: credit used vs. line 0.696 to 1.00	14	636	94.7	36	5.70%	228	137	6.50%	261
Credit Line: \$400 up to \$5500									
Gender: F									
Age: 48 to 60									

Individual Group Statistics						Cumulative Statistics		
Group I.d. (node number)	Size of group	Percentile	Number of Responses	Response Rate	Group Lift or Leverage	Cumulative Responses	Cumulative Rate	Cumulative Lift
21	752	98.1	60	8.00%	320	60	8.00%	320
18	721	96.3	41	5.70%	228	101	6.90%	275
14	636	94.7	36	5.70%	228	137	6.50%	261

apparently cannot go into other applications, they seem a moot point.)

Nice as it is to have the full story, as many years of sad experience have taught me, most clients cannot process and understand a complete classification tree diagram. Figs. 5a and 5b give you some idea of what I am talking about, comparing the unvarnished tree output with the approximate level of detail that most client-types can tolerate.

As the diagrams show, the number-one client priority in information is usually "How are we doing?", assuming the analysis is structured to answer that question. They may also ask about one or two other key competitors, but usually want to see them separately before taking a look at all three (or two) combined.

Anyhow, allowing the user to select which categories appear at each node, and which statistics appear along with this, would greatly help this program create useful output.

Another feature of classification tree analysis that comes in quite handy is the "gains" analysis. This shows all final groups, or "terminal nodes," in the tree, and how they

compare in (for instance) incidence of some group that we care about greatly. They appear in order, from highest to lowest. The large table shown here is a portion of a gains analysis, in the form that a client might want.

The smaller table shows how the gains analysis comes out of AnswerTree. It is missing the highly important information about who is in each group. This leaves the unfortunate user in the position of needing to provide this information for the program. While the old KnowledgeSeeker did not do a great job formatting this output, it at least put some form of group definition with each group. Your reviewer is sure SPSS can do this as well, and requests that they do.

AnswerTree: a summary

SPSS has come very far with release 2.0 of this product. It has top-notch analytical capabilities, as we would expect for products from this software maker.

I really hope that they will work to resolve problems with the tree diagram output quickly. To repeat myself, the default "copy and paste" format for these diagrams, the plain

bitmap (.BMP) falls short of acceptability for professional-level presentations. The programs need to have cutting and pasting take place in the true enhanced Windows metafile format, just as the old KnowledgeSeeker program has done for years. Beyond this, it would be helpful if the program allowed choices in the contents that appear in the tree diagram, and if it allowed group descriptions to appear in the gains analysis.

Another feature that would help users is a progress meter of some type. For instance, KnowledgeSeeker displays the name of the variable it is processing in the small pane at the lower left of its program window. Watching these names fly past, generally faster than you can see, makes you understand how fast the program is working. A meter like this can greatly reduce any subjective feeling of slowness in this type of analysis. Here's a case where AnswerTree could borrow from the main SPSS program, which has long included a case counter, showing just how far it has gotten in the analysis.

DeltaGraph 4.0: a reprise

This program is not new to these pages, but a reminder seems in order, since it is at the top of its class. In



short, DeltaGraph provides charting and graphing power of the highest order. It has the best mix of simplicity of use, chart customization, and depth of features of any charting/graphics package your reviewer has yet encountered. DeltaGraph has a long history on the Macintosh, and now, in its Version 4.0 series (the current release is 4.05), has become fully compatible with Windows 98. (It still comes in a Macintosh version.)

Even though other programs, including Excel, Harvard Graphics, and Lotus Freelance — and SPSS itself, as mentioned — have strongly improved graphing abilities,

DeltaGraph remains several steps ahead of all. It offers over 70 different chart types, and over 200 styles, grouped into "galleries." Just browsing through its offerings may give you new ideas about ways to display data.

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

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

Other useful charts rarely seen elsewhere include "x-y bars" and "bubble charts." In x-y bars the widths represent one series of numbers, and the heights another. For instance, you can make the widths of the bars represent the sizes of groups being analyzed, and the heights represent market shares among those groups. Unlike a simple bar chart, this can give you a quick visual impression of how two factors vary at one glance. (This even has been client-tested, and elicited no more than 60 seconds of blank stares from any audience.) Using this chart type, for instance, you could quickly show how much of total sales volume goes into each group. (The area of each bar in the chart — height times width — would show the proportion of volume accounted for by the group. The bigger the bar, then, the more volume in the group. Most people get this idea.)

Bubble charts are useful because they can show both an "x-y" position for a point and represent (for instance) its importance, by its size. This can add very nicely to several types of maps.

DeltaGraph also has many analytical extra features, some of which have become expected of a charting package. For instance, it can calculate and plot regression lines and fit various types of curves (power, exponential, logarithmic, etc.), and calculate new data with built-in formulas. More advanced features include the ability to add "error bars" to exact specifications (for instance, at 1.5 standard deviations around plotted points in either or both directions, if you wish), and an editor specifically for equations. DeltaGraph also can handle charts with thousands of data points, if you and your audience can.

You can make a sort of a slide show with DeltaGraph alone, but I prefer to use it as a supplement to programs like PowerPoint or Excel, when they do not have enough charting power. Charts from DeltaGraph paste very nicely into these applications, as the good kind of Windows enhanced metafiles, which print at the best resolution your printer can offer. The charts also can be ungrouped, and edited one element at a time, in PowerPoint and several other programs.

DeltaGraph is particularly useful as an adjunct to these programs in part because (unlike them), DeltaGraph does not think it knows better than you when it comes to labeling. On bar charts in particular, DeltaGraph will include all the labels you request, and not skip some to satisfy its own internal sense of aesthetics.

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

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

In addition, it would be nice if the menus were reorganized somewhat. As they now stand, you can alter elements of the chart with three menu items, "Options," "Properties," and "Format." Until you have used this program for a while, you may find it unclear which one of these you need to perform the changes you want. Almost always, the item you want to modify has a control someplace, but you may need to search for it.

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

Parts of DeltaGraph's charting power continue to find their ways into each release of SPSS, but even so, you likely will find this a remarkably versatile and useful piece of software. It packs a tremendous amount of charting power, regardless of price — and at \$295 looks like an exceptional value for the money.

SPSS in particular should be congratulated for recognizing an outstanding program NIH (not invented here), and getting this remarkable product when it could. The original maker of this program was a once Mac-centered outfit called DeltaPoint. Here's one instance where SPSS found a way to take on board years of clever program development, rather than reinventing it.

A two-minute review

SPSS 9.0 definitely represents a major upgrade of the program. If you have an earlier version, and have

been holding off on upgrading, the time is at hand. In particular, if you are considering taking on the analysis of discrete choice modeling (DCM) problems, SPSS now has the tools you need. You may need an add-on module or two more than you ever did, but then, you are getting more functionality in the bargain.

SYSTAT has become a real powerhouse of a program. If your budget is tight, and you want one piece of software that will do nearly everything you could ask, this is your choice. (The only salient gaps in SYSTAT are a lack of conjoint analysis as it is commonly done, and classification tree methods that use two-way splits only.) If you do any heavy lifting in

SPSS 9.0 definitely represents a major upgrade of the program. If you have an earlier version, and have been holding off on upgrading, the time is at hand.

data analysis, you almost certainly will want both SPSS and SYSTAT on your system.

AnswerTree 2.0 represents a major step toward having a comprehensive classification-tree-analysis program, at a price that will not make you ill. As such, it fills an important gap. SPSS still needs to beef up AnswerTree's limited facilities for copying and pasting tree diagrams into other applications, to make the tree displays more flexible, and to strengthen the output in gains analysis. If they can do that, this will become the best classification tree analysis program of all time.

DeltaGraph 4.04 remains at the top of its class in charting and graphing programs. This program has had a minor enhancement since our last report, but remains the same outstanding software that we reviewed earlier. This program earns the strongest of recommendations.

About SPSS pricing

If you have not yet bought a statistics package, you may be surprised to find that they are much more expensive than an office suite program, a create-a-card program, or even the latest 3-D action game. This is because the statistics program is targeted toward a smaller and more select audience than mass-market software, i.e., you.

In any event, that's the explanation your reviewer has heard. (The fact that SPSS probably has over a million users worldwide has nothing to do with this discussion.) Whatever the causation, expect to pay about \$795 for the SPSS base and some \$295 to \$395 for each add-on module. You can get discounts for buying several modules at once, and for buying more than one copy of the program. You need to call SPSS to find out about the exact discounts available. AnswerTree, as mentioned earlier, weighs in at \$995, which is the same price as SYSTAT.

The Smart Viewer program requires that you pay a fee for each user who gets the viewer with your output. SPSS asks a fee of \$195 for the first user, then has steep discounts for subsequent users. SPSS also has a Web server version of the Viewer, which allows you to put SPSS output on the Web for all to see. Be advised though, that this latter program is a true "enterprise level application," in that it is very expensive. Expect to pay about \$20,000 for this.

More next month

That's about it for SPSS products at the moment. Next month we'll look at some new items from Microsoft and also look at a data viewing program. You can address any comments (except the negative ones) and absolutely any questions to me at SMStruhl@aol.com. ☞

Research Industry News

continued from p. 14

tribution to clients.

Decision Analyst, Inc., Arlington, Texas, has added a new division to assist clients with customer satisfaction and loyalty programs.

Richard Kurtz & Associates, a New York-based research consulting firm, recently completed a qualitative research study to evaluate creative communications for the proposed World War II memorial to be built in Washington, D.C. Richard Kurtz coordinated the project and moderated the groups, working with Marsteller Advertising — the agency of record for the proposed memorial — and The Ad Council.

Gainesville, Fla.-based **Irwin Research Associates, Inc.**, has opened a facility in Ocala, Fla., expanding its telephone research, data processing and field management capabilities.

Harris Black International, a Rochester, N.Y., research firm, has formed a new operating group, Harris Interactive, to develop new data collection methodologies using the Internet and other technologies.

Southfield, Mich.-based research firm **Market Strategies, Inc.**, and **Press, Ganey Associates**, a South Bend, Ind., patient satisfaction measurement firm, have formed a strategic alliance to collect patient and managed care satisfaction data. The collaboration has enabled the firms to become NCQA-certified to conduct the HEDIS/CAHPS 2.0H Survey. Press, Ganey will administer mail surveys, and Market Strategies will conduct the telephone interviews needed to obtain response rates required by NCQA.

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. Or visit www.quirks.com/media/moderator.html.

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Elrick and Lavidge
Just The Facts, Inc.
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IMAGE STUDIES

Cambridge Associates, Ltd.
Holleran Consulting
Image Engineering, Inc.
Langer Associates, Inc.
Rothenberg Consulting Group

INDUSTRIAL

First Market Research Corp. (Heiman)
Market Navigation, Inc.

INSURANCE

Burr Research/Reinvention
Prevention
Erlch Transcultural Consultants
Low + Associates, Inc.

INTERACTIVE PROD./ SERVICES/RETAILING

Research Connections, Inc.

INTERNET

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

INTERNET SITE CONTENT & DESIGN

Perception Research Services, Inc.

LATIN AMERICA

Best Practices Research
Hispanic Marketing
Communication Research
Strategy Research Corporation
SuperDatos de México

LAW/MOCK JURY

Marketeam Associates

MANUFACTURING

Holleran Consulting

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Cambridge Associates, Ltd.
Chalfont Healthcare Research, Inc.
D/R/S HealthCare Consultants
Pat Henry Market Research, Inc.
I+G Medical Research International
Matrixx Marketing-Research Div.
MedProbe™ Inc.
QS&A Research & Strategy
Paul Schneller - Qualitative

MODERATOR TRAINING

Cambridge Associates, Ltd.
Macro International

MULTIMEDIA

Marketing Advantage Rsch. Cnslts.

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BAIGlobal Inc.
Milton I. Brand Marketing
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C&R Research Services, Inc.
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Daniel Associates
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Dolobowsky Qual. Svcs., Inc.
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Erick and Lavidge
Fader & Associates
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Just The Facts, Inc.
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Outsmart Marketing
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Jay L. Roth & Associates, Inc.
Paul Schneller - Qualitative

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Doyle Research Associates
Strategic Focus, Inc.

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ON-LINE FOCUS GROUPS

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Lieberman Research Worldwide
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Marketing Advantage Rsch. Cnslts.
James Spanier Associates

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Knowledge Systems & Research, Inc.
Lieberman Research Worldwide
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Doane Marketing Research, Inc.
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Rothenberg Consulting Group
Schwartz Consulting Partners

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Markinetics, Inc.
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Knowledge Systems & Research, Inc.

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Macro International

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***Directory of Data
Processing &***



***Statistical
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If you're looking for a firm to handle your data processing tasks or statistical analysis, check the listings on the following pages. If you're looking for marketing research software, consult the directory on page 99.

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Service Codes

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DTData Tabulation
SCScanning Services
SAStatistical Analysis

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Brazil
Ph. 55-11-257-0711
Fax 55-11-256-3982
E-mail: abaco@amcham.com.br
Alan Grabowsky, President
Services: CD, DE, DT, SC, SA

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Ph. 610-967-2242
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5 Appletree Ln.
Lexington, MA 02420-2406
Ph. 781-862-2804
Fax 781-862-2640
E-mail: info@ablesw.com
www.ablesw.com
Dr. Yecheng Wu, President
Services: SC

Accountability Information Management, Inc.
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Palatine, IL 60067
Ph. 847-358-8558
Fax 847-358-8089
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The Accutab Co.
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Tinton Falls, NJ 07724
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Fax 732-460-1215
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Jon Brunetti, Principal
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Pierre Laclede Center
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(See advertisement on p. 42)

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Ph. 718-824-8887
Fax 718-824-8856
Susan Acquafredda, President
Services: DE



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The Analytical Group, Inc.
640 N. LaSalle Dr.
Chicago, IL 60610
Ph. 312-751-2915
Fax 312-337-2551
E-mail: jerry@analyticalgroup.com
www.acsinfo.com
Jerry Madansky, CEO
Branch office:
8687 E. Via de Ventura
Scottsdale, AZ 85258
Ph. 602-483-2700
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(See advertisement on p. 101)

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www.adainc.com
Lynne Weber, Principal
Services: SA

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Peter Hooper, President
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William M. Bailey, Ph.D.
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38 E. 29th St.
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E-mail: info@barryleedsassoc.com
www.barryleedsassoc.com
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Minneapolis, MN 55410
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www.primenet.com/~brc/
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The Blackstone Group
360 N. Michigan Ave., Ste. 1500
Chicago, IL 60601
Ph. 312-419-0400
Fax 312-419-8419
Ashref Hashim, President
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Michael Blatt & Co., Inc.
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Fax 805-524-1531
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Michael Blatt, President
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Bolding Tab Service, Inc.
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Lee Bolding, President
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Seattle, WA 98101
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E-mail: moreinfo@bosma-associates.com
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Bretton-Clark
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Morristown, NJ 07960
Ph. 973-993-3135
Fax 973-993-1757
Services: SA

Business Research Services, Inc.
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23825 Commerce Park
Cleveland, OH 44122-5841
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Fax 216-292-3048
Barb Eloff, Director, Field Svcs.
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CACI Marketing Systems
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3 Ballston Plaza
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Fax 703-243-6272
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www.demographics.caci.com
Services: SA

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Cardiff Software
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San Marcos, CA 92069
Ph. 760-752-5244
E-mail: sales@cardiffsw.com
Services: DE

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 Julie Wagner, President
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 E-mail: alancimbal@sprintmail.com
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 Services: CD

Claritas Inc.
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 Arlington, VA 22209
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(See advertisement on p. 103)

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 www.cstat.com/~comstat
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 Birmingham, MI 48009
 Ph. 800-336-0159
 Fax 248-645-5685
 E-mail: cpi@consumerpulse.com
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 Convergys Center
 4600 Montgomery Rd.
 Cincinnati, OH 45212
 Ph. 513-458-1590
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 E-mail: research@convergys.com
 www.convergys.com
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 Hastings-On-Hudson, NY 10706
 Ph. 914-478-0444
 Fax 914-478-7637
 E-mail: Doris_DJC@msn.com
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 Lisa Bacon, V.P. Sales
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Crimmins & Forman Market Research
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 Southfield, MI 48076
 Ph. 248-569-7095
 Fax 248-569-8927
 E-mail: CrimForm@aol.com
 Robert Sullivan
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Cunningham Field & Research Service, Inc.
 Administrative/Focus Facility
 770 W. Granada Blvd., Ste. 101
 Ormond Beach, FL 32174
 Ph. 904-677-5644
 Fax 904-677-5534
 E-mail: CFSFIELD@aol.com
 Services: CD, DE, DT, SC, SA

Data Based Marketing
 3421 Empresa Dr., Ste. C
 San Luis Obispo, CA 93401
 Ph. 805-545-5468 or 888-797-5669
 Fax 805-545-5465
 www.powerknowledge.com
 Services: CD, DE, DT, SA

Data Probe, Inc.
 Datatab
 49 East 21st St.
 New York, NY 10010
 Ph. 212-228-6800
 Fax 212-228-9600
 E-mail: DATAPROB@idt.net
 Jim Sheridan, Vice President
 Services: CD, DE, DT

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5929 Baker Rd., Ste. 470
 Minnetonka, MN 55345
 Ph. 612-935-5900
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 Deanna L. Hudella, Director, Bus. Dev. Svcs.
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(See advertisement on p. 78)

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(See advertisement on p. 79)

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 Florham Park, NJ 07932-1720
 Ph. 201-377-4546
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 Solebury, PA 18963
 Ph. 215-794-7486
 Fax 215-794-3177
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DATAN, Inc. is a behavioral research company in Princeton, New Jersey, USA, specializing in custom services, special projects and data analytic system-building. DATAN was founded by Michael C. Stentz, Ph.D. in 1981. Dr. Stentz has been involved with a variety of user-oriented research computing and statistical/graphical applications in academic and business environments since 1974.

(See advertisement on p. 3)

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 Jerry Lisovich, Director
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(See advertisements on pp. 9, 117)

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Pine Company
 PMR-Personal Marketing Research, Inc.
 Point-of-View™ Survey Systems
 PROTAB
 Pulse Analytics, Inc.
 Quantum Consulting, Inc.
 Quest Research
QUESTAR
Raosoft, Inc.
 RDA Group
 ReData, Inc.
 Renaissance Research & Consulting
Research Connections, Inc.
 Research Data Services, Inc.
 Rockbridge Associates, Inc.
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 Ruf Strategic Solutions
 Saja Software, Inc.
 Salford Systems
Scantron Survey Group
 SDR Sampling Services
 Smart Software, Inc.
 Socratic Technologies, Inc.
 Spectra/Market Metrics, Inc.
 Spring Systems
SPSS MR
 Standard Data Corporation
 Statistical Graphics Corporation
 StatPac, Inc.
 STATpro's
 StatSoft, Inc.
 Strategic Marketing Services
 Strategic Power
STS/Survey Tabulation Services, Inc.
 Superior DataWorks, LLC
 Survey Analysis, Inc.
 Survey Service, Inc.
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Following is a list of firms that produce and sell marketing research software. On page 119 is a cross-reference of software features/functions and on page 123 is an alphabetical list of the software packages and their makers. If you're looking for firms that provide data processing and statistical analysis, consult the directory on page 75.

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Able Software Co.
5 Appletree Ln.
Lexington, MA 02420-2406
Ph. 781-862-2804
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(See advertisement on p. 32)

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Fax 931-389-6096
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(See advertisement on p. 100)

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Fax 852-2881-5918
E-mail: info@ami-group.com
www.ami-group.com
Software:
AMI PinPoint™
AdCheck™



The Analytical Group, Inc.

640 N. LaSalle Dr.
Chicago, IL 60610
Ph. 312-751-2915
Fax 312-337-2551
E-mail: jerry@analyticalgroup.com
www.acsinfo.com
Jerry Madansky, CEO
Branch office:
8687 E. Via de Ventura
Scottsdale, AZ 85258
Ph. 602-483-2700
Fax 602-905-1416
E-mail: Jack@acsinfo.com
www.acsinfo.com
Jack Pollack, President

Software:

WinQuery
WinCross
Knockout
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WinLink
SP-Link
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Arthur

WinQuery, Windows-based computer-aided interviewing system featuring easy questionnaire set-up, sample management, quota control, interviewing productivity and disposition reports. WinCross, a Windows-based crosstabulations system. Full featured tabulations with point-and-click Windows ease of use. WinCross features include a spell checker, editor, and database capability.

(See advertisement on p. 101)

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(See advertisement on p. 101)

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Minneapolis, MN 55410
Ph. 612-924-9193
Fax 612-926-1145
E-mail: sales@beachtech.com
www.beachtech.com
Software:
E-Form Version 3.0

Bruce Bell & Associates, Inc.
425 Main St., Ste. 10
Canon City, CO 81212
Ph. 800-359-7738
Fax 719-275-1664
Software:
Abtab for Windows

Applied Decision Analysis, LLC
2710 Sand Hill Rd.
Menlo Park, CA 94025
Ph. 650-854-7101
Fax 650-854-6233
E-mail: lynne.weber@pwcglobal.com
www.adainc.com
Lynne Weber, Principal
Software:
Market Analysis Systems
DPL Decision Analysis Software

The Arbitron Company
142 West 57th Street
New York, NY 10019
Ph. 212-887-1300
Fax 212-887-1401
www.arbitron.com
Software:
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Media Professional

AutoData Systems
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Minnetonka, MN 55343
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Software:
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Fax 617-484-9219
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www.forecastpro.com
Software:
Forecast Pro

CACI Marketing Systems
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3 Ballston Plaza
Arlington, VA 22201
Ph. 800-292-2224 or 800-394-3690
Fax 703-243-6272
E-mail: msgw@hq.caci.com
www.demographics.caci.com
Software:
Site Reporter
Sourcebook America

Caliper Corporation
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Newton, MA 02161
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www.caliper.com
Software:
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Cardiff Software
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E-mail: sales@cardiffsw.com
Software:
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Eric Lesh, General Manager
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Perception Analyzer



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(See advertisement on p. 103)

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www.cstat.com/~comstat
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Fax 707-765-1068
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www.surveysystem.com
Lisa Bacon, V.P. Sales
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Cybernetic Solutions - The Survey Software
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Fax 801-964-9574
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www.xmission.com/~cyberman
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Fax 617-661-4405
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Dr. Cyrus Mehta, CEO
Software:
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Proc StatXact
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Fax 805-545-5465
www.powerknowledge.com
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PowerTab[™]

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Datatab
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New York, NY 10010
Ph. 212-228-6800
Fax 212-228-9600
E-mail: DATAPROB@idt.net
Jim Sheridan, Vice President
Software:
Surge
Quick Post



Data Research Services, Inc.
 3323 Chamblee-Dunwoody Rd.
 Chamblee, GA 30341
 Ph. 770-455-0114
 Fax 770-458-8926
 E-mail: tab@dataservice.com
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 Bill Tyner, President
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(See advertisement on p. 79)

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 Fax 609-987-9120
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 www.dvrinc.com
 Ron Vangi, President
Software:
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 StatChek[™] Stat Checking

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 Solebury, PA 18963
 Ph. 215-794-7486
 Fax 215-794-3177
 E-mail: JJeter@datalab.com
 www.datalab.com
 John Jeter, President
Software:
 Futrex
 EZ-Map



DATAN, Inc.
 735 Prospect Ave.
 Princeton, NJ 08540
 Ph. 609-921-6098 or 609-683-0281
 Fax 609-921-6731
 E-mail: michael.stentz@rcn.com
 www.datan.com
 Michael C. Stentz, Ph.D., President
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(See advertisement on p. 3)

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 Pittsburgh, PA 15235
 Ph. 412-795-3401
 Jerry Lisovich, Director
Software:
 Custom Applications

DataStar, Inc.
 85 River St., Ste. 6
 Waltham, MA 02453
 Ph. 781-647-7900
 Fax 781-647-7739
 E-mail: info@surveystar.com
 www.surveystar.com
 Ellie Smerlas, President
Software:
 Starware/STAT[™]

Dat@xiom Software, Inc.

Dataxiom Software, Inc.
 3700 Wilshire Blvd., Ste. 1000
 Los Angeles, CA 90010
 Ph. 213-383-9973
 Fax 213-383-3542
 E-mail: sales@dataxiom.com
 www.dataxiom.com
Software:
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Dataxiom Software Inc. provides data analysis solutions for researchers and marketing research professionals. We offer a collection of very affordable statistical software such as StatMost, NCSS, Power & Precision and various interactive data analysis learning tools like Statistics on CD-ROMs. With expertise in various areas, we offer data analysis and statistical consulting to market research professionals.
(See advertisement on p. 39)

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(See advertisement on p. 31)

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www.decisive.com
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DecisionSource

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(See advertisement on p. 105)

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DynaMap/2000
GDT Data

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(See advertisement on p. 35)

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Fax 514-861-9209
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www.izusoft.com
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STAT XP

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David L. Saad, President
Software:
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Mary Fiorello, Market Specialist
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(See advertisement on p. 107)

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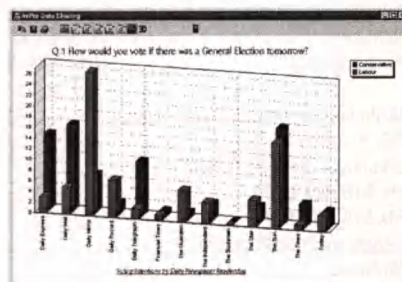
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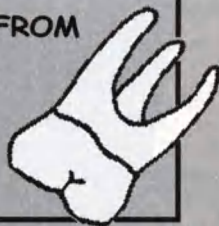
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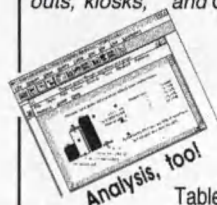
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(See advertisement on p. 113)

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(See advertisements on pp. 48, 115)

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(See advertisement on p. 92)



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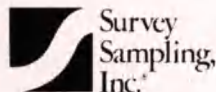
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Computers for Marketing Corp. (CfMC) (Win)
 Comstat Research Corporation (Win)
 Creative Research Systems (Win)
 Data Based Marketing (Win)
Data Research Services, Inc. (Win)
 Data Vision Research, Inc. (Win)
DATAN, Inc. (Win/Unix)
 DBM Associates (Win)
 Decisive Technology (Win)
 DESAN Marketresearch BV (Win)
 Detail Technologies, Inc. (Win)
 GeoDemographics, Ltd. (Win)
 Informative, LLC (Win/Mac/Unix)
 MacGregor Suzuki, Inc. (Win)
 Market Research Software Ltd. (Win)
 MDSS (Win)
Mercator Corporation (Win)
Microtab, Inc. (Win)
 NCS (Win)
NIPO, The Market Research Institute (Win)
 P-STAT, Inc. (Win/Unix)
 Point-of-View™ Survey Systems (Win)
Principia Products, Inc. (Win)
 Pros & Cons, Inc. (Win)
Pulse Train Technology (Win)
 QMIRAC International, Inc. (Win)
Raosoft, Inc. (Win)
 ReadSoft, Inc. (Win)
 Research Solutions (Win)
 Saja Software, Inc. (Win)
Sawtooth Software, Inc. (Win)
Scantron Survey Group (Win)
 Senecio Software, Inc. (Win/Mac)
 Service Measurement Group, Inc. (Win)
 Irwin P. Sharpe & Associates (Win)
 Spring Systems (Win)
SPSS MR (Win/Unix)
 Statistical Graphics Corporation (Win)
 StatPac, Inc. (Win)
 StatSoft, Inc. (Win/Mac)
 William Steinberg Consultants, Inc. (Win)
 Suburban Associates (Win)
 3D Software Services (Win/Unix)
 Touch Base Computing (Win)
 The Uncle Group, Inc. (Win)

Viking Software Services, Inc. (Win/Unix)

Database Management Programs

Beach Tech Corporation (Win)
Claritas Inc. (Win)
Data Research Services, Inc. (Win)
Data Vision Research, Inc. (Win)
DATAN, Inc. (Win/Unix)
DBM Associates (Win)
INFONETICS Corporation (Win)
Information Management Assoc., Inc. (IMA) (Win)
MDSS (Win)
Media Market Reports, Inc. (Win)
NIPO, The Market Research Institute (Win)
Optimum Solutions Corp. (Win)
P-STAT, Inc. (Win/Unix)
Qualitative Marketing Software, Inc. (Win/Unix)
Raosoft, Inc. (Win)
Scantron Survey Group (Win)
Spring Systems (Win)
StatSoft, Inc. (Win)
3D Software Services (Win/Unix)
Touch Base Computing (Win)

Decision Support Software

Applied Decision Analysis, LLC (Win)
Business Forecast Systems (Win)
Catapult Systems Corp. (Win)
Cognos Corporation (Win)
Cybernetic Solutions - The Survey Software (Win)
DATAN, Inc. (Win/Unix)
Delphus, Inc. (Win)
Market Advantage Consulting & Software (Win)
Marketing Systems Group (Win/Mac/Unix)
Mathematical Data Systems, Inc. (Win)
MDSS (Win)
Media Market Reports, Inc. (Win)
P-STAT, Inc. (Win/Unix)
Raosoft, Inc. (Win)
Salford Systems (Win/Mac/Unix)
Sammamish Data Systems (Win)
Tactician Corporation (Win)

Demographic Database Software

Able Software Co. (Win)
The Arbitron Company (Win)
Beach Tech Corporation (Win)
Bruce Bell & Associates, Inc. (Win)
CACI Marketing Systems (Win)
Caliper Corporation (Win)
Claritas Inc. (Win)
Data Research Services, Inc. (Win)
DBM Associates (Win)
GENESYS Sampling Systems (Win)
GeoDemographics, Ltd. (Win)
Informative, LLC (Win/Mac/Unix)
MapInfo, Inc. (Win)
National Decision Systems (Win)
NCS (Win)
Pitney Bowes Software Systems (Win)
QQQ Software, Inc. (Win/Unix)
Qualitative Marketing Software, Inc. (Win/Unix)
Sammamish Data Systems (Win)
Scantron Survey Group (Win)
Spectra/Market Metrics, Inc. (Win)
Tactician Corporation (Win)
Tetrad Computer Applications, Ltd. (Win)
USADATA.com (Win)

Disk by Mail Interviewing

Americom Research, Inc. (Win)
The Analytical Group, Inc. (Win)
Applied Decision Analysis, LLC (Win)

Catapult Systems Corp. (Win)
Computers for Marketing Corp. (CfMC) (Win/Unix)
Creative Research Systems (Win)
Cybernetic Solutions - The Survey Software (Win)
Gordon Research Services, Inc. (Win)
INFO ZERO UN (Win)
Market Research Software Ltd. (Win)
Marketing Masters (Win)
Marketing Metrics, Inc. (Win)
MarketVision Research® (Win)
NCS (Win)
NIPO, The Market Research Institute (Win)
Opus Technologies, Inc. (Win)
Perseus Development Corporation (Win)
Raosoft, Inc. (Win)
Research Solutions (Win)
Saja Software, Inc. (Win)
Sawtooth Software, Inc. (Win)
Sawtooth Technologies (Win)
Scantron Survey Group (Win)
Senecio Software, Inc. (Win/Mac)
Socratic Software, Inc. (Win)
Touch Base Computing (Win)

Experimental Design

Americom Research, Inc. (Win)
DATAN, Inc. (Win/Unix)
Dataxiom Software, Inc. (Win)
Moskowitz Jacobs Inc. (Win)
NCSS (Win)
SPSS MR (Win)
Statistical Graphics Corporation (Win)
StatSoft, Inc. (Win)

Field Management Software

Americom Research, Inc. (Win)
Cognos Corporation (Win)
Computers for Marketing Corp. (CfMC) (Win)
INFO ZERO UN (Win)
NIPO, The Market Research Institute (Win)
SPSS MR (Win/Unix)
William M. Strahle & Associates (Win)
Tactician Corporation (Win)

Focus Group Management

Computers for Marketing Corp. (CfMC) (Win/Unix)
Digisoft Computers, Inc. (Win)
MDSS (Win)

Focus Group/Qualitative/Verbatim Analysis

Computers for Marketing Corp. (CfMC) (Win/Unix)
Comstat Research Corporation (Win)
DATAN, Inc. (Win/Unix)
Marketing Masters (Win)
Marketing Metrics, Inc. (Win)
Service Measurement Group, Inc. (Win)
SPSS MR (Win)

Internet Interviewing

Americom Research, Inc. (Win)
Apian Software, Inc. (Win)
Beach Tech Corporation (Win)
Bus Internet, Inc. (Win/Mac/Unix)
Catapult Systems Corp. (Win)
Computers for Marketing Corp. (CfMC) (Win)
Data Based Marketing (Win)
INFO ZERO UN (Win)
Informative, LLC (Win/Mac/Unix)
Marketing Masters (Win)
MarketVision Research® (Win)

Mercator Corporation (Win)
 Niche Design Group (Win/Mac/Unix)
NIPO, The Market Research Institute (Win)
 Opus Technologies, Inc. (Win)
 Perseus Development Corporation (Win/Unix)
Pine Company (Win)
Pulse Train Technology (Win)
Raosoftware, Inc. (Win)
 Research Solutions (Win/Mac)
RONIN Corporation (Win/Mac/Unix)
Sawtooth Software, Inc. (Win)
Scantron Survey Group (Win)
 Senecio Software, Inc. (Win/Mac/Unix)
 Socratic Software, Inc. (Win)
SPSS MR (Win)
 SurveySite (Win)
 3D Software Services (Win/Unix)

Name Generation

Americom Research, Inc. (Win)
 Informative, LLC (Win/Mac/Unix)
 The Namestormers (Win)

Neural Networks

Mathematical Data Systems, Inc. (Win)
SPSS MR (Win)
 StatSoft, Inc. (Win)

OCR/ICR/OMR/Scanning Systems

Able Software Co. (Win)
 AutoData Systems (Win)
 Cardiff Software (Win)
Mercator Corporation (Win)
 NCS (Win)
 Optimum Solutions Corp. (Win)
Pine Company (Win)
Principia Products, Inc. (Win)
 ReadSoft, Inc. (Win)
 Research Solutions (Win)
 SAS Institute Inc. (Win/Unix)
Scantron Survey Group (Win)

Perceptual Mapping

Bretton-Clark (Win)
 Caliper Corporation (Win)
DATAN, Inc. (Win/Unix)
 Information Management Assoc., Inc. (IMA) (Win)
 Market Advantage Consulting & Software (Win)
 Mathematical Data Systems, Inc. (Win)
 NCCS (Win)
 SAS Institute Inc. (Win/Unix)
Sawtooth Software, Inc. (Win)
 Spring Systems (Win)
SPSS MR (Win)
 Strategic Power (Win)

Questionnaire Design

Apian Software, Inc. (Win)
 Beach Tech Corporation (Win)
 Cardiff Software (Win)
 Catapult Systems Corp. (Win)
Computers for Marketing Corp. (CfMC) (Win/Unix)
 Cybernetic Solutions - The Survey Software (Win)
 Data Based Marketing (Win)
DATAN, Inc. (Win/Unix)
 DBM Associates (Win)
Decision Analyst, Inc. (Win)
 Decisive Technology (Win)
 GeoDemographics, Ltd. (Win)
 INFO ZERO UN (Win)

INFONETICS Corporation (Win)
 Informative, LLC (Win/Mac/Unix)
 Market Research Software Ltd. (Win)
 Marketing Metrics, Inc. (Win)
Mercator Corporation (Win)
 Niche Design Group (Win/Mac/Unix)
NIPO, The Market Research Institute (Win)
 Opus Technologies, Inc. (Win)
 Perseus Development Corporation (Win)
Pulse Train Technology (Win)
Raosoftware, Inc. (Win)
 Research Solutions (Win)
 Saja Software, Inc. (Win)
Sawtooth Technologies (Win)
Scantron Survey Group (Win)
 Senecio Software, Inc. (Mac)
 Socratic Software, Inc. (Win)
SPSS MR (Win/Unix)
 William Steinberg Consultants, Inc. (Win)
 Touch Base Computing (Win)

Sales Database

Beach Tech Corporation (Win)
 Digisoft Computers, Inc. (Win)
 GeoDemographics, Ltd. (Win)
 Market Probe International, Inc. (Win)
 Mathematical Data Systems, Inc. (Win)
 SAS Institute Inc. (Win/Unix)
 Spectra/Market Metrics, Inc. (Win)
 William M. Strahle & Associates (Win)
 Tactician Corporation (Win)

Sampling Systems/Software

Affordable Samples, Inc. (Win)
Computers for Marketing Corp. (CfMC) (Win/Unix)
Decision Analyst, Inc. (Win)
GENESYS Sampling Systems (Win)
Maritz Marketing Research Inc. (Win)
NIPO, The Market Research Institute (Win)
Polk (Win)
Scientific Telephone Samples (Win)
 SDR Sampling Services (Win)
Survey Sampling, Inc. (Win)
 SurveySite (Win)
 Touch Base Computing (Win)

Structural Equation Modeling/Path

Market Probe International, Inc. (Win)
 Multivariate Software, Inc. (Win/Mac/Unix)
 SAS Institute Inc. (Win/Unix)
 StatSoft, Inc. (Win)

Times Series Analysis

Business Forecast Systems (Win)
 Cognos Corporation (Win)
DATAN, Inc. (Win/Unix)
Dataxiom Software, Inc. (Win)
 Delphus, Inc. (Win)
 Manugistics, Inc. (Win)
 Mathematical Data Systems, Inc. (Win)
 NCS (Win)
 NCCS (Win)
 Oakdale Engineering (Win)
 P-STAT, Inc. (Win/Unix)
PAI-Productive Access, Inc. (Win)
 Spring Systems (Win)
SPSS MR (Win)
 Statistical Graphics Corporation (Win)
 StatSoft, Inc. (Win/Mac)
 Techtel Corporation (Win)

Software Title Cross-Index

A

ABASE, Advanced Data Research, Inc.
Aftab for Windows, Bruce Bell & Associates, Inc.
ACA System, Sawtooth Software, Inc.
AdCheck™, The AMI Group of Companies
Advanced Statistics Program, P-STAT, Inc.
Advantage®, Spectra/Market Metrics, Inc.
aiICLEAR, SPSS MR
AMI PinPoint™, The AMI Group of Companies
Answertree, SPSS MR
ARGUS Perceptual Mapper, Spring Systems
Arthur, The Analytical Group, Inc.
ASK?em, INFONETICS Corporation
Auto Coder®, Data Research Services, Inc.
AUTOCODE™, MacGregor Suzuki, Inc.
AutoData Pro™ II, AutoData Systems
AutoData SDK, AutoData Systems
AutoData Survey, AutoData Systems
AutoData Survey Plus, AutoData Systems
Automated Research Communications Sys. (ARCS), DBM Associates
AutoTour, William M. Strahle & Associates

B

Bellview, Pulse Train Technology
Bellview Scan, Pulse Train Technology
Bridger, Bretton-Clark
Bus Online Survey Software, Bus Internet, Inc.

C

C-Gen, William Steinberg Consultants, Inc.
CART® (Classification & Regression Trees), Salford Systems
Catalog of software products, SciTech International, Inc.
CATI-Net, Americom Research, Inc.
CatiHelp, I/H/R Research Group
CBC System, Sawtooth Software, Inc.
CCA System, Sawtooth Software, Inc.
Censational Mapper Forecast, GeoDemographics, Ltd.
Centrus™ Desktop, Qualitative Marketing Software, Inc.
CIMC/NIPO Script Composer, NIPO, The Market Research Institute
ChannelSolv, Market Advantage Consulting & Software
Ci3 CATI for Windows, Sawtooth Technologies
Ci3 for Windows, Sawtooth Technologies
Ci3 System, Sawtooth Software, Inc.
Claritas Coder, Claritas Inc.
Claritas Connect, Claritas Inc.
Claritas Mapping, Claritas Inc.
Compass, Claritas Inc.
Conjoint Analyzer, Bretton-Clark
Conjoint Designer, Bretton-Clark
Conjoint Linmap, Bretton-Clark
Conjoint Segmenter, Bretton-Clark
COSI, Computers for Marketing Corp. (CIMC)
Coupon Optimizer, Spectra/Market Metrics, Inc.
CRIS (Customer Response Information System), TARP
Crossfire, Market Advantage Consulting & Software
Custom Applications, Datatetics
Custom Applications, Gordon Research Services, Inc.
Custom Software Packages, Pine Company
CVA System, Sawtooth Software, Inc.

D

Data Desk, Research Solutions
Data Entry Program, P-STAT, Inc.

Data Manipulation, Microtab, Inc.
Data Mining Automation Engine, Market Advantage Consulting & Software
DataFit 6.0, Oakdale Engineering
DataTrix, Dataxiom Software, Inc.
DecisionSource, Decisive Technology
Decisive Survey, Decisive Technology
DPL Decision Analysis Software, Applied Decision Analysis, LLC
DynaMap/2000, Geographic Data Technology, Inc.

E

E-Form Version 3.0, Beach Tech Corporation
E-Surveys, Research Solutions
The EDGE Software System, Information Management Assoc., Inc. (IMA)
eListen, Scantron Survey Group
Enlighten™, Spectra/Market Metrics, Inc.
Enlighten™ for Retailers, Spectra/Market Metrics, Inc.
EQS Structural Equation Modeling Software, Multivariate Software, Inc.
Eyes & Hands, ReadSoft, Inc.
EZ-Map, Datalogics
EZSurvey 98 for the Internet, Raosoft, Inc.

F

FAQSS, Optimum Solutions Corp.
FASTAB Ad Hoc Tabulation, DATAN, Inc.
Feedback Manager, Service Measurement Group, Inc.
FinalFocus, Pitney Bowes Software Systems
Flo - Stat 2, Senecio Software, Inc.
Forecast Pro, Business Forecast Systems
4THOUGHT, Cognos Corporation
Futrex, Datalogics

G

GDT Data, Geographic Data Technology, Inc.
GENESYS Sampling Systems, GENESYS Sampling Systems
GENESYS-ID, GENESYS Sampling Systems
GENESYS-Plus, GENESYS Sampling Systems
GeoSight, Sammamish Data Systems
GeoStan™, Qualitative Marketing Software, Inc.
GISPLUS®, Caliper Corporation
Gold, Microtab, Inc.

H

Headliner, The Namestormers
HitSearch™, Eagle Research - Denver
HitSearch™, Eagle Research - Atlanta
Housing Planning Analysis, GeoDemographics, Ltd.
Hyper Q., Americom Research, Inc.

I

I-Net, Americom Research, Inc.
ICE Module, Sawtooth Software, Inc.
IdeaMap® Wizard™, Moskowitz Jacobs Inc.
Image Retrieval®, Data Research Services, Inc.
ImagEntry, Viking Software Services, Inc.
iMark®, National Decision Systems
In2form, SPSS MR
In2quest for CAPI, SPSS MR
Industry Info Analysis, GeoDemographics, Ltd.
InfoMark, Claritas Inc.
Informix Interface Program, P-STAT, Inc.
Inquisite Survey, Catapult Systems Corp.
Interviewdisk™, Marketing Metrics, Inc.
INTERVIEWER, INFO ZERO UN
InterWatch Electronic, USADATA.com
IT CATI/CAPI, DESAN Marketresearch BV

ITE Browser, ISPC Ltd.
 ITE Electronic Fiche, ISPC Ltd.
 ITE Publisher, ISPC Ltd.
 ITE Web Publisher, ISPC Ltd.

J

Juggler, The Analytical Group, Inc.

K

Key.collect, Apian Software, Inc.
 Knockout, The Analytical Group, Inc.

L

Latent Class Module, Sawtooth Software, Inc.
 Localizer, Spectra/Market Metrics, Inc.
 LOGIT, Salford Systems
 LogXact, Cytel Software

M

MaCATI 2 - CAPI, Senecio Software, Inc.
 MaCATI 2 - CATI, Senecio Software, Inc.
 MaCATI 2 - DMS, Senecio Software, Inc.
 MaCATI 2 - e-Poll, Senecio Software, Inc.
 MapInfo, Tetrad Computer Applications, Ltd.
 MapInfo Professional, MapInfo, Inc.
 Mapping, Mathematical Data Systems, Inc.
 Mapscan, Media Market Reports, Inc.
 Maptitude®, Caliper Corporation
 MapWise, Strategic Power
Maritz Stats™, Maritz Marketing Research Inc.
 Market Analysis Systems, Applied Decision Analysis, LLC
 Market Target Plus, USADATA.com
 MarketQuest, Claritas Inc.
 MarketSight 2.5, Decision Architects
 MARS™, Salford Systems
 MaximiSer, The Arbitron Company
 MCA=, Bretton-Clark
 Media Professional, The Arbitron Company
MENTOR, Computers for Marketing Corp. (CfMC)
MERLIN Tabulation System, DATAN, Inc.
MERLINplus (MERLIN plus Menus), DATAN, Inc.
MERLINT Ad Hoc Tabulation, DATAN, Inc.
 MicroVision®, National Decision Systems
 MKTSIM, Spring Systems
 MPA, Detail Technologies, Inc.
 MPA™ Data Entry, Data Vision Research, Inc.
MT/Stat, Microtab, Inc.
mTAB Research Analysis System, PAI-Productive Access, Inc.

N

NamePro, The Namestormers
 Namer, The Namestormers
 NCS Survey, NCS
 NCS Works, NCS
NCSS, Dataxiom Software, Inc.
 NCSS, NCSS
Net.collect, Apian Software, Inc.
 Network TV Optimizer, Spectra/Market Metrics, Inc.
NewView, SPSS MR
 Niche 1 Insight™, Niche 1 Insight, Inc.
NIPO CAPI System, NIPO, The Market Research Institute
NIPO CATI System, NIPO, The Market Research Institute
NIPO DIANA, NIPO, The Market Research Institute
NIPO Interview System (Stand Alone), NIPO, The Market Research Institute

O

ONCEOVER, Detail Technologies, Inc.
 Onceover™ Data Cleaning, Data Vision Research, Inc.

P

P-STAT® Base Program, P-STAT, Inc.
 PASS, NCSS
 PCensus, Tetrad Computer Applications, Ltd.
 PCPUNCH, Pros & Cons, Inc.
 PEER Planner for Windows, Delphus, Inc.
 Perception Analyzer, Columbia Information Systems
 PinPoint, Research Solutions
Plastic, Microtab, Inc.
Platinum, Microtab, Inc.
Point to Point®, Data Research Services, Inc.
 Pop-up Survey Software, SurveySite
 Positioning, Mathematical Data Systems, Inc.
 PositionSolv, Market Advantage Consulting & Software
Power & Precision, Dataxiom Software, Inc.
 PowerTab™, Data Based Marketing
 Precision Code, Claritas Inc.
 PrefSolv, Market Advantage Consulting & Software
PRO-T-S (Proactive Telephony Systems), PRO-T-S Telephony Systems
PRO-T-S Telephony Systems, Marketing Systems Group
 Proc StatXact, Cytel Software
 ProductScope™, MarketVision Research®
Professional, Microtab, Inc.
Professional W/Stat, Microtab, Inc.
 ProphetPoint®, National Decision Systems
Pulsar, Pulse Train Technology
 Pulsar, Star Data Systems, Inc.
Pulse Survey II, Scantron Survey Group
 Pulse/K-of-N™, Pulse Analytics, Inc.
 Pulse/MPC™, Pulse Analytics, Inc.
 Pulse/QSEG™, Pulse Analytics, Inc.
 Pulse/QUAD™, Pulse Analytics, Inc.
 Pulse/TURF™, Pulse Analytics, Inc.

Q

Q-Leap, The Analytical Group, Inc.
 QBAL, Jan Werner Data Processing
 QBAL, Trehwella, Cohen & Arbuckle, Inc. (T/C/A)
 QEDIT, Trehwella, Cohen & Arbuckle, Inc. (T/C/A)
 QEDIT, Jan Werner Data Processing
 QGEN, Trehwella, Cohen & Arbuckle, Inc. (T/C/A)
 QGEN, Jan Werner Data Processing
 QMARG, Jan Werner Data Processing
 QMARG, Trehwella, Cohen & Arbuckle, Inc. (T/C/A)
 QPS, Market Research Software Ltd.
 QPS for Windows, QMIRAC International, Inc.
 QTAB, Trehwella, Cohen & Arbuckle, Inc. (T/C/A)
 QTAB-II, Jan Werner Data Processing
 QTILE, Trehwella, Cohen & Arbuckle, Inc. (T/C/A)
Quancept CATI, SPSS MR
Quancept Telephony System: Auto/Predictive Dialer, SPSS MR
Quancept Web, SPSS MR
Quanquest, SPSS MR
Quantum, SPSS MR
Quanvert, SPSS MR
 Quick Post, Data Probe, Inc.
 Quick STATISTICA, StatSoft, Inc.
 Quick STATISTICA/Mac, StatSoft, Inc.
 Quick Tally®, Quick Tally Interactive Systems, Inc.
 QUICK-POLL - Survey System, Touch Base Computing
 QWRITERII for Windows, Point-of-View™ Survey Systems

R

R2V for Windows & NT, Able Software Co.
Raosoft EZReport, V.4.0, Raosoft, Inc.

Raosoft SURVEY, V.2.7, Raosoft, Inc.
Raosoft SURVEYWin, V.4.0, Raosoft, Inc.
Remark Office OMR®, Principia Products, Inc.
Remark Web Survey™, Principia Products, Inc.
Research Tracker®, MDSS
ResponseLink, Opus Technologies, Inc.
Results for Research, RONIN Corporation
Results for the Net, RONIN Corporation
REVISSA, Market Probe International, Inc.

S

SAS Software, SAS Institute Inc.
SatisSolv, Market Advantage Consulting & Software
SCANTEST, Market Probe International, Inc.
scyField, SPSS MR
scyPhone, SPSS MR
scyTab, SPSS MR
scyWeb, SPSS MR
scyWriter, SPSS MR
SegmentSolv, Market Advantage Consulting & Software
Sensus Multimedia, Sawtooth Technologies
Sensus Q&A, Sawtooth Technologies
Sensus TradeOff, Sawtooth Technologies
Sfd Forecaster, William M. Strahle & Associates
Sidepad, Advanced Data Research, Inc.
Silver, Microtab, Inc.
Simgrat, Bretton-Clark
Simulation, Mathematical Data Systems, Inc.
Site Reporter, CACI Marketing Systems
Site Targeter, Tactician Corporation
Smart Forecasts for Windows, Smart Software, Inc.
Smartviewer, SPSS MR
snap internet®, Mercator Corporation
snap key station®, Mercator Corporation
snap lite®, Mercator Corporation
snap professional®, Mercator Corporation
snap results®, Mercator Corporation
snap scanning®, Mercator Corporation
Solution Series, Claritas Inc.
Sound-SURVENT, Computers for Marketing Corp. (CfMC)
Sourcebook America, CACI Marketing Systems
SP-Link, The Analytical Group, Inc.
SPANS Explorer, PCI Geomatics
SPANS GIS, PCI Geomatics
SPANS Map, PCI Geomatics
Spreadsheet Forecaster, Delphus, Inc.
SPSS Base & Modules, SPSS MR
SSI - SNAP™, Survey Sampling, Inc.
STAMPER®, Data Research Services, Inc.
Star, Pulse Train Technology
Starware/STAT™, DataStar, Inc.
STAT XP, INFO ZERO UN
STATCHEK, Detail Technologies, Inc.
StatChek™ Stat Checking, Data Vision Research, Inc.
STATGRAPHICS Plus, Manugistics, Inc.
STATISTICA, StatSoft, Inc.
STATISTICA Design of Experiments, StatSoft, Inc.
STATISTICA Power Analysis, StatSoft, Inc.
STATISTICA Process Analysis, StatSoft, Inc.
STATISTICA QC Charts, StatSoft, Inc.
STATISTICA/Mac, StatSoft, Inc.
STATISTICA/Neural Networks, StatSoft, Inc.
Statistics Calculator, StatPac, Inc.
StatMost, Dataxiom Software, Inc.
StatPac for Windows, StatPac, Inc.
StatPac Gold IV, StatPac, Inc.
STATS™, Decision Analyst, Inc.
StatXact 4, Cytel Software
Stratgraphics Plus, Statistical Graphics Corporation
STS Online, Scientific Telephone Samples
Super-Scripting, Digisoft Computers, Inc.
Surge, Data Probe, Inc.
SURVENT, Computers for Marketing Corp. (CfMC)

THE SURVEY, Cybernetic Solutions - The Survey Software
Survey Database Management Systems, Marketing Systems Group
The Survey Genie, William Steinberg Consultants, Inc.
Survey Pro, Apian Software, Inc.
Survey Pro, Scantron Survey Group
Survey Said for the Web, Marketing Masters
Survey Said for Windows, Marketing Masters
Survey Select, Saja Software, Inc.
Survey Stats, Drago Consulting Inc.
Survey Stats, Marketing Masters
The Survey System, Creative Research Systems
Survey Tracker, NCS
Survey Tracker Plus, NCS
SURVEY-Entry, V.4.0, Raosoft, Inc.
SURVEY-Tools, Raosoft, Inc.
SurveyBuilder, Opus Technologies, Inc.
SurveyBuilder.com, Informative, LLC
SURVEYkits, Research Solutions
SurveySolutions for the Web, Perseus Development Corporation
SurveyViewer, Opus Technologies, Inc.

T

The T.A.B. Program™, Suburban Associates
T-MAST™, Techtel Corporation
TABS Program, P-STAT, Inc.
TABULYZER III, Irwin P. Sharpe & Associates
Tactician 4.0, Tactician Corporation
Tactician MapScape, Tactician Corporation
Tactician Micro-Marketing Machine, Tactician Corporation
Tactician Selling Machine, Tactician Corporation
Tactician Snap-On-Solutions, Tactician Corporation
Tag Along Trainer, William M. Strahle & Associates
TargetPro, MapInfo, Inc.
Teleform Elite - Enterprise Edition Ver. 6, Cardiff Software
Teleform Elite Version 6, Cardiff Software
Teleform Internet Solution, Cardiff Software
Teleform MediClaim Module, Cardiff Software
Teleform Standard Version 6, Cardiff Software
Teleprompt™, 3D Software Services
Telescript 5.0, Digisoft Computers, Inc.
Text Analysis Program-TAP, Comstat Research Corporation
"TIPS" (Permitting Software), GeoDemographics, Ltd.
TPL Report, QQQ Software, Inc.
TPL Tables, QQQ Software, Inc.
TURBO Spring-Stat, Spring Systems

U

Ufill, V.4.0, Raosoft, Inc.
UNCLE, The Uncle Group, Inc.
UNISTAT for Windows, P-STAT, Inc.
Usurvey, V.4.0, Raosoft, Inc.

V

VDE, Viking Software Services, Inc.
Verbatim Analyzer™, Marketing Metrics, Inc.
Verbatim Blaster, StatPac, Inc.
Vertical Mapper, Tetrad Computer Applications, Ltd.
Viewer, Advanced Data Research, Inc.
Vismart, Niche Design Group
Visual Q®, Socratic Software, Inc.

W-Z

Web-SURVENT, Computers for Marketing Corp. (CfMC)
WinCross, The Analytical Group, Inc.
WinLink, The Analytical Group, Inc.
WINPRIN, Detail Technologies, Inc.
WinQuery, The Analytical Group, Inc.
WINXII, Delphus, Inc.

Researcher SourceBook™

Mall
Facilities

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Customer Satisfaction

Your

Data

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Interviewing Facilities

Statistical Analysis

E T H N I C R E S E A R C H

Source

Mystery
Shopping

Software

Focus

Group

Moderator

MarketPlace™

Facilities



With eleven annual directories plus the every-issue Moderator MarketPlace™, Quirk's Marketing Research Review is YOUR SOURCE for research providers.

Listing Additions

Please add the following firms to the 1999 Mystery Shopping Directory:

Premack and Associates
8130 66th St. N., Ste. 10
Pinellas Park, FL 33781
Ph. 727-544-3191
Fax 727-544-2777
Audrey Premack, Secretary-Treasurer
Locally - Full service
B, F, H, R, RT, S

Rothermel Research, Inc.
107 Elm Tree Ln.
Elmhurst, IL 60126-3616
Ph. 630-834-8330
E-mail: krothermel@sprynet.com
Karen Rothermel, President
Local - Data collection/Field service
B, E, F, R, RT, S

KLD Marketing Research
1603 E. Lincolnway
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In the listing for ServiceTRAC on p. 83 of the

directory, please add "Restaurant/fast food" as an industry in which ServiceTRAC conducts mystery shops.

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From the Publisher

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There were about 150 men and women in attendance and I knew probably two-thirds of them so I was able to mingle well with the crowd.

As with most large luncheons or dinners, the room was organized so that the attendees sat at round tables while the association officers and the speaker were seated at a long table facing the audience. I was seated next to Fred and we seemed to converse about everything except the upcoming presentation.

The dessert was served and my adrenaline started to rise as I realized it was getting close to the witching hour. Even though I'd made the presentation so often I could have done it in my sleep, each time there was still a surge of energy inside of me just before addressing the audience.

Because this was the opening meeting, the president's speech to the members went on and on. Finally, after what seemed like half an hour (but was really only five or 10 minutes), Fred was called on to introduce me as the speaker for the evening. I was facing the audience and knew that at least some of them would be watching me during the introduction so I tried to maintain a demeanor somewhere between humility and attentiveness.

As Fred moved to the podium I was mentally getting everything in order. My response to the flattering introduction was ready, my slide projector had been tested and was in focus, and my notes and outline were inside the folder in my right hand. As soon as Fred finished and the applause had started I would be on my feet with a smile that would say to the audience, "I'm happy to be here."

I watched as Fred looked out over the podium at the audience and started speaking. "When I took the job as program chairman," he began, "I called the treasurer and asked him how much we had in our budget for speakers. The treasurer replied that no money had ever been allocated for the program committee, including speakers, and that this year would be no different. So, ladies and gentlemen, tonight you are going to get what you paid for: Tom Quirk."

At that point he stepped back from the microphone and returned to his seat.

As soon as the audience realized the introduction was truly over there was a gasp, which was immediately followed by nervous titters. Although clearly the crowd realized the program chairman had caught me off guard with his remarks and were sympathetic to my situation, their final evaluation of me would depend on my reaction. Would I respond with rancor? Or would I be so stunned that I couldn't do anything, let alone make an effective presentation?

Fortunately, as mentioned earlier, a majority of the audience were acquaintances and I felt comfortable appearing before them. So, after taking a deep breath and a few seconds to compose myself I put on the best smile I could muster and went to the lectern.

Looking out over the audience I said, "Folks, I want to thank you for inviting me here tonight for the opening

meeting of the season. It's great that Fred didn't spend much time on the introduction because we can immediately get to presentation which, in turn, means there will be more time for questions at the end of the evening. I almost wish I got this kind of introduction more often."

The response seemed to be well received and the ensuing presentation went off without a hitch.

In that instance, I handled things correctly. But things didn't go so well on another occasion when I was faced with an unforeseen event.

I had been contracted to hold a series of meetings with cattle farmers which included a short video presentation of a new product followed by a showing of the product. After the product information portion was completed each of the participants was given a printed questionnaire to complete. Although the forms looked similar there were in fact three versions, each with different price points to help the manufacturer determine optimal pricing for the product. The client had pre-tested the questionnaire in the Midwest and was satisfied that the methodology would get them the information they needed.


The first set of meetings we held in the Midwest and the West seemed to confirm their view. The next set of meetings were held in the Mid-Southern states of Georgia, Tennessee, Mississippi, and Alabama. At the first of these sessions I noted there were more wives in attendance than normal. Cattle raising is a male-dominated business and although wives were not barred from attending we did not encourage it.

After the product presentation, the questionnaires were passed out and it was then I saw why the wives had come along with their husbands: The men were illiterate — something neither the client nor I had thought of when setting up the methodology!

The wives were reading the questionnaires aloud to their husbands and soon everyone realized that the forms contained different price points. By the time I realized what was happening it was too late to stop the proceedings and we had to discard the questionnaires.

Success in the earlier meetings had caused me to become lax and I was not prepared for the unexpected. Looking back, the number of spouses in attendance should have raised suspicions in me. Although we instituted safeguards to avoid this problem in the future, my failure to take action caused us to lose the results from that meeting.

Incidents such as the two I've described happen all too often. If we are on our toes it is possible to turn the unexpected to our advantage, or mitigate the damage, but if we become complacent it is possible to suffer serious consequences. One should never take anything for granted.

The unexpected can happen at any time — even when all appears to be going as planned and you've covered every possible base. If someone does throw you a curve ball while you're, say, presenting survey findings or justifying the need to continue that costly tracking program, it is important to be prepared and to react as calmly and rationally as possible. Quick thinking and a cool head can turn even an ugly situation to your favor. 



From the Publisher

By Tom Quirk/QMRR publisher

Expect the unexpected

Planning and organization are critical to success — a simple statement to which we would all agree. But as Art Shulman frequently shows in his “War Stories” column, oftentimes people fool us and don’t do what we expect of them. How we react to the unexpected can mean the difference between success and failure.

A number of years ago when I was with the now-defunct Miller Research Services in Minneapolis one of the markets we served was still getting accustomed to using commercial research services. Many of the marketing people operated by the seat of their pants.

In an attempt to expand the use of research services we put together a presentation called “The Non-Commercial Commercial Research Presentation.” The purpose was twofold. First, to show how important research was as a part of a marketing effort, and second, to demonstrate through examples why it was important to use commercial research firms for information gathering and evaluation.

At no time did we mention Miller Research Services but we knew that by making the presentation, commercial research services would be associated with our organiza-

tion. We worked very hard at getting the presentation onto the bill at industry programs and when we made the presentation, business followed.

The marketing people within this industry had an active trade association with a number of local chapters. One morning I received the call from Fred (whom I had never met), the program director for the Kansas City chapter, which was one of the largest and most active groups in the country. Fred asked me if I was available to make our presentation at their kickoff meeting in September.

Was I available? In an instant! Normally the opening meeting drew the largest attendance of the year so being asked to appear was quite a coup for us. I immediately agreed and Fred gave me the date and location along with his address so that I could send him my bio for his introduction.

When that day in September finally rolled around I was well-prepared. My bio had been sent per schedule and I was at the country club for the reception prior to the dinner.

continued on p. 129

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