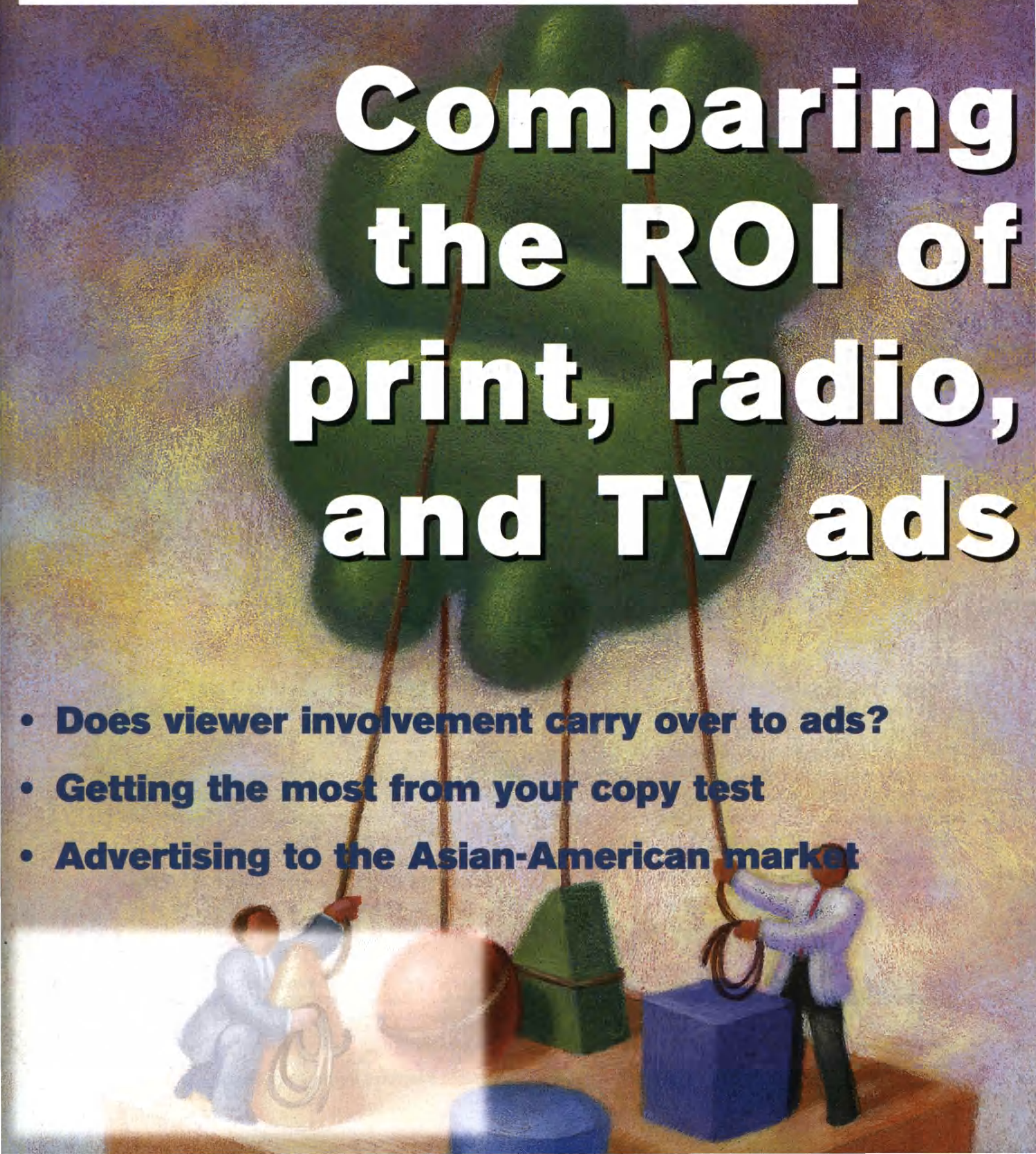
QUIRK'S
Marketing Research Review

Volume XIII, Number 3
March 1999

Comparing the ROI of print, radio, and TV ads



- Does viewer involvement carry over to ads?
- Getting the most from your copy test
- Advertising to the Asian-American market

G.C.
Advertising
New Markets
Promotions
Product Design
Packaging
HOWARD
The Sea of Ideas

©1997 MJI. All rights reserved. In the U.S.A., MessageMap™ is licensed to Migliara/Kaplan. ®™ Property of Luxton Enterprises.

You can call it a treasure map
We call it IdeaMap®

There's treasure waiting to be found in your marketplace... a Big Idea that opens a rich new vein of consumer gold. Let IdeaMap®'s concept development studies lead you to it.

Gain Comprehensive Power. With IdeaMap®'s powerful, computer-based conjoint technology, you examine as many as 400 elements – words or phrases describing benefits or features; pictures; even videoclips – with a relatively small, efficient sample of respondents. Uncover the most compelling of all possible elements – and develop yourself a sure-fire advertising or product concept.

Discover New Opportunities. IdeaMap®'s stimulus-response testing and powerful attitudinal segmentation lets you see the category as it really is, not as it is thought to be. It reveals promising segments you never knew existed – and shows you how to exploit these lucrative new opportunities with maximum impact.

Lower Your Costs. One moderately-sized IdeaMap® study yields more complete and more actionable results, more rapidly, than a large and expensive study with any alternative methods.

Discover where the real treasure is buried. Write or call:
Moskowitz Jacobs Inc.,
1025 Westchester Avenue, White Plains, N.Y. 10604.
Telephone **914.421.7400.** Fax 914.428.8364.
Or visit our web site at: www.mji-designlab.com.

PromotionMap™ *Accurately determine your most effective promotional offer.*

StyleMap™ *Reach the optimal design for a package or product.*

MessageMap™ *Get the competitive edge in the ethical pharmaceutical market.*

KidsMap™ *Draw meaningful results from the children's market.*

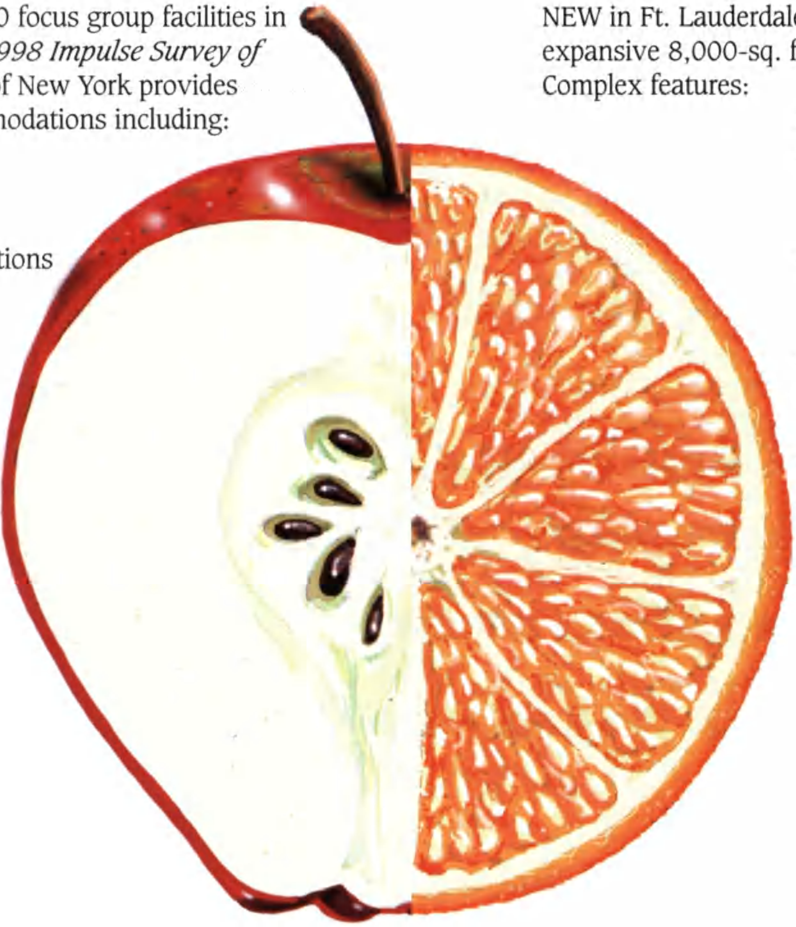
ProductEngineer® *Find and fill the holes in your market.*

DesignLab® *The world's most advanced testing facilities.*

IdeaMap® is part of Moskowitz Jacob Inc.'s Accelerated Integrated Development Process

Who says you shouldn't mix apples & oranges?

Not our clients!



IN THE "BIG APPLE"

Rated among the top 10 focus group facilities in North America in the *1998 Impulse Survey of Focus Facilities*, WAC of New York provides state-of-the-art accommodations including:

- 3 focus group suites
- Spacious accommodations for client-viewers
- On-site recruiting
- FocusVision videoconferencing
- Kitchen facilities
- Cafe WAC

Specializing in business, medical, technical, consumer and financial respondents.

WAC
Of New York

60 Madison Avenue
New York, New York 10010
Phone: 212-725-8840 Fax: 212-213-9247
Email: wacny@wacresearch.com
Internet: www.wacresearch.com

IN THE "BIG ORANGE"

NEW in Ft. Lauderdale, Florida, WAC's expansive 8,000-sq. ft. Focus Group Complex features:

- 4 focus group suites
- Theater-style seating for 50 respondents
- Accommodations for up to 25 client-viewers
- On-site recruiting
- FocusVision videoconferencing
- Kitchen facilities
- Cafe WAC

Specializing in consumers of all ages, plus medical, technical, business and financial respondents.

WAC
Of South Florida INC

1415 West Cypress Creek Road
Fort Lauderdale, Florida 33309
Phone: 954-772-5101 Fax: 954-772-2774
Email: wacflorida@wacresearch.com
Internet: www.wacresearch.com

QUIRK'S
Marketing Research Review

Volume XIII, Number 3 March 1999

CONTENTS

FEATURES

Case histories

20 Effectiveness by association?

Study seeks to determine if a TV viewer's involvement in a program carries over to ads

22 Using recognition-based tracking to compare the ROI of print, radio and TV

Techniques

24 Keys to successful advertising in the Asian-American market

28 Getting the most out of your copy test

34 Advertising and packaging: your product's voice and face

38 Seven signs of fallout from the information explosion

Publisher
Tom Quirk

Editor
Joseph Rydholm

Advertising Sales Manager
Evan Tweed

Production Manager
James Quirk

Directory Manager
Stephen Quirk

Marketing Manager
Dan Quirk

Business Manager
Marlene Flohr

Quirk's Marketing Research Review, (ISSN 08937451) is issued 11 times per year – Jan., Feb., Mar., Apr., May, June, July, Aug./Sep., Oct., Nov., Dec. – by Quirk Enterprises, Inc., 8030 Cedar Ave., Ste. 229, Bloomington, MN 55425. Mailing address: P.O. Box 23536, Minneapolis, MN 55423. Tel.: 612-854-5101; Fax: 612-854-8191; E-mail: quirk19@mail.idt.net; Web address: http://www.quirks.com. Periodicals postage paid at Minneapolis, MN and additional mailing offices.

Subscription Information: U.S. annual rate (11 issues) $70; Canada and Mexico rate $100 (U.S. funds); international rate $119 (U.S. funds). U.S. single copy price $10. Change of address notices should be sent promptly; provide old mailing label as well as new address; include ZIP code or postal code. Allow 4-6 weeks for change. **POSTMASTER**: Please send change of address to QMRR, P.O. Box 23536, Minneapolis, MN 55423.

Quirk's Marketing Research Review is not responsible for claims made in advertisements.

Editorial policy: We invite submission of manuscripts from outside sources. Write or call for guidelines. Send press releases and other editorial material to Joseph Rydholm, editor. We reserve the right to edit any manuscript.

Reprints: For information on article reprints, please call Reprint Management Services at 717-560-2001.

Copyright 1999 by Quirk's Marketing Research Review

DEPARTMENTS

8 Survey Monitor
10 Product & Service Update
12 Names of Note
14 Research Industry News
16 War Stories
18 Data Use
74 Moderator MarketPlace
82 Classified Ads/Listing Additions
83 Index of Advertisers
84 Letters
86 Trade Talk

What Makes A Boston Focus Group A Bernett Focus Group?

When you need Boston, call Bernett Research. We're Boston's hometown facility and we try to take the work out of research.

The Bernett Secret?

It's more than comfortable rooms
with free Internet access
and adjoining lounges.

It's more than the freshest candy

And it's more than a Commonwealth Avenue address with plenty of free parking (avoiding Boston's Big Dig nightmare).

It's more than in-room, individually
controlled temperature systems,
and our continually replenished database.

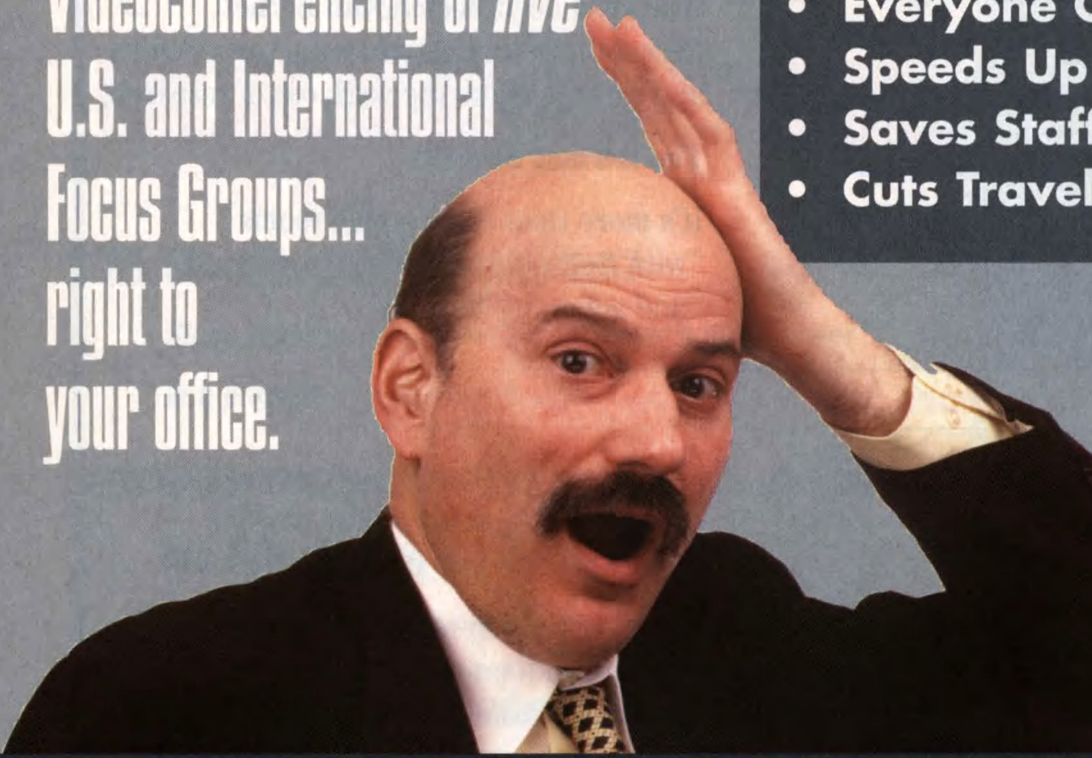
It's the highest levels of professionalism from Boston's most knowledgeable project coordinators.

And our commitment to having a little fun along the way.

Bernett
Research

Be a part of the team.

Family owned and operated since 1974.
1505 Commonwealth Avenue, Boston, MA 02135
Phone: 617-746-2600 www.bernett.com



"I should have used FocusVision...

Videoconferencing of *live* U.S. and International Focus Groups... right to your office.

- Everyone Can Attend
- Speeds Up Information
- Saves Staff Time
- Cuts Travel Costs

U.S.

Atlanta
Fieldwork Atlanta
Plaza Research–Atlanta
Superior Research
Baltimore
House Market Research
Boston
Bernett Research
Fieldwork Boston
Focus Pointe Boston
Focus On Boston
Chicago Downtown
Adler-Weiner Research, Inc.
Fieldwork Chicago, Inc.
* *Murray Hill Center*
Smith Research
TAI–Chicago, Inc.
Chicago Suburban
Fieldwork Chicago– West
Focuscope, Inc.
Oakbrook Interviewing Center
Quality Controlled Services
Smith Research
Cincinnati
The Answer Group
Cleveland
Pat Henry Market Research
Columbus, OH
Quality Controlled Services
Dallas
Consumer Research Assoc./Superooms
Fieldwork Dallas
Plaza Research Dallas
Quality Controlled Service
Savitz Research Center
Denver
Colorado Market Research
Fieldwork Denver, Inc.
Information Research, Inc.
Plaza Research
Detroit
Quality Controlled Services
Ft. Lauderdale, FL
Plaza Research
WAC of So. Florida
Houston
C.Q.S. Center for Qualitative Studies
Plaza Research
Jacksonville, FL
Irwin Research Services
Kansas City
The Field House
Quality Controlled Services
Los Angeles
Adler-Weiner Research, Inc.
Murray Hill Center West
National Qualitative Network (Quick Test)
Plaza Research–LA
Trotta Associates
Los Angeles, Orange Cty.
Fieldwork Los Angeles–Orange County
Trotta Associates Irvine, CA
Miami
* *National Opinion Research*
Minneapolis
Orman Guidance Research
New Jersey
Cunningham Field Service
Fieldwork East– Ft. Lee
* *Meadowlands Consumer Center, Inc.*
* *Peters Marketing Research*
Plaza Research–Paramus
Schlesinger Associates, Inc.
TAI–New Jersey, Inc.
New York City
Murray Hill Center
New York Focus
Schlesinger Associates, Inc.
WAC of New York
Focus Suites
New York Suburban
Fieldwork NY–Westchester
Philadelphia-Downtown
Focus Pointe
JRA Marketing Research
Philadelphia-Suburban
Focus Suites
Plaza Research–Marlton
Focus Pointe–Bala Cynwyd
Quality Controlled Services
Phoenix
Fieldwork Phoenix–So. Mountain
Fieldwork Phoenix–Scottsdale
Raleigh
L&E Research
Sacramento
Research Unlimited
San Diego
Luth Research
San Francisco
Consumer Research Assoc./Superooms
Ecker & Associates
Fleischman Field Research
Plaza Research–San Francisco
San Jose
San Jose Focus
Seattle
Gilmore Research Group
St. Louis
Peters Marketing Research
Quality Controlled Services
Tampa
Superior Research
TAI–Tampa, Inc.
Washington, DC
House Market Research

CANADA

Toronto, Canada
Focus First
Toronto Focus

FocusVision Worldwide,™ Inc. 1266 East Main Street ■ Stamford, Connecticut 06902

...Worldwide™!"

What is FocusVision Worldwide?
FVW is the company that invented the idea of videoconferencing of live focus groups right into client offices. Videoconferencing of focus groups is our only business and FocusVision Worldwide is the largest provider of this service.

FocusVision Benefits.
FocusVision delivers quality focus groups live, "in real time" from virtually anywhere in the world without all the inconvenience, time and fatigue of travel. Besides speeding up the project cycle, and getting information faster, you increase exposure of your people to the groups while you save hundreds of hours of staff travel and thousands of dollars of travel costs.

Exclusive FVW Features.
Each facility is equipped with multiple cameras with live operator, ongoing moderator communication, simultaneous translation link for international projects, and an FVW technician at the client location upon request. Our Technical Center and FocusVision-trained specialists around the world ensure seamless technical delivery of your projects.

Which leading marketers are using FocusVision?
Heavy users of our services include blue chip marketing organizations in packaged goods, pharmaceuticals, high tech, financial institutions, ad agencies and more. The list grows every month.

The integrity of the focus group experience is preserved.
You select your own moderators, deal directly with the facilities on project specifications, and conduct the groups. Then FocusVision delivers the experience in tact. If focus groups are an important part of your research program, FocusVision makes sense. It's a no-brainer!

To put all this in focus... Call our President, John Houlahan at 203-961-1715.

OUI!
RIGHTO!
SI!

International

WESTERN EUROPE

Copenhagen, Denmark
* *GfK Denmark A/S*

London, England
GfK-Great Britain
London Focus
Westend Focus

Paris, France
* *GfK-Sofema*
MV2 Conseil
NovaTest

Frankfurt, Germany
intraTeam
MR&S

Hamburg, Germany
INRA Deutschland
Schweiger Marktforschung

Munich, Germany
* *GfK Marktforschung*

Nürnberg, Germany
Concentra

Milan, Italy
* *ASM–Milan*
CIRM

Naples, Italy
Adacta

Rome, Italy
Pragma
Pro-Marketing Research
* *SELECTA/ASM*
SGR International

Amsterdam, The Netherlands
* *INTOMART (GfK)*

Barcelona, Spain
Inner Research S.A.

Madrid, Spain
Inner Research S.A.

Stockholm, Sweden
* *BORELL Mkt. Res. AB (GfK)*

EASTERN EUROPE

Vienna, Austria
* *Fessel & GfK*

Prague, Czech Republic
* *GfK Praha*

Budapest, Hungary
* *GfK Hungaria*

Warsaw, Poland
* *GfK Polonia*

Bucharest, Romania
* *GfK Romania*

Russia, Moscow
* *GfK Russia*

ASIA PACIFIC

Melbourne, Australia
* *Viewpoint Group Rooms*

Sydney, Australia
Bennett Research Pty. Ltd.

Hong Kong
* *Marketing Decision Research (Pacific)*

Shanghai, China
* *Marketing Decision Research (Pacific)*

Osaka, Japan
Japan Statistical & Research Co.
Pulse Co. Ltd.

Tokyo, Japan
ACNielsen Customised
Japan Statistics & Research Co.
JMRB–Research International
Lyncs Market Focus

Seoul, South Korea
Gallup Korea

Taipei, Taiwan
Viewpoint Research & Consulting Co., Ltd

LATIN AMERICA

Buenos Aires, Argentina
INFOQUALITY

Sao Paulo, Brazil
* *CPM Market Research*
* *Demanda*
* *EP Escritorio de Pesquisa Eugenia Paesani*

Mexico City, Mexico
EPI Grupo
Indemerc Louis Harris
Pearson

** Available Nov./Dec. 98*

■ (203) 961-1715 ■ Fax (203) 961-0193 ■ E-mail: FVN1@aol.com ■ Web Site: www.focusvision.com

Do TV ads make kids want to buy?

Preliminary findings from a study of kids' reactions to commercials provide insight into the continuing debate over whether television commercials stimulate America's children to desire the products they see. The Kid Ad-Traction study, a national study of more than 800 children age 6-17, was completed by CME KidCom, the kid marketing unit of the Campbell Mithun Esty (CME) ad agency.

The findings show that television commercials earning high rankings among kids for their entertainment value, while impacting recall, do not necessarily translate into product desirability. "The perception that the commercials kids favor automatically induce them to desire what's being featured doesn't necessarily hold up," says Christine Fruechte, CME KidCom general manager. "We've discovered a gray zone that puts conditions on how kids decide what they want to buy. An additional, essential component is needed to result in a motivating formula.

"Generally, the commercials kids identified as most motivating are for toys, fast food and clothing," Fruechte says. "These are products that are appropriate for them, and they're also products which they can enjoy and purchase themselves." The top 10 motivating commercials cited (in rank order) were Sony PlayStation; Nintendo 64; Barbie; Taco Bell/McDonald's; Burger King; Laser Tag; Tyco Remote Control Car; Giga Pet/Nike/Volkswagen; Legos, and Levi's.

Most of the kids surveyed (69 percent) said a commercial motivated them to want the brand featured because it included actual demonstration of the product, its features and benefits. Conversely, that same reason drew a mere 15 percent response for making a commercial their "favorite." Humor or "being funny," which garnered more than half the responses for their favorite commercials, hit the cellar at 2 percent for being motivational. "Kids seek immediate gratification, and they want information like adults do," Fruechte says. "They want to see how a game works, what the food looks like, see what the product does — what's in it for me." Fully 90 percent of the children surveyed agreed that "it's important a commercial tell me something about the product."

Of 303 commercial mentions, ads for the following brands landed in the kids top 10 "favorites": Budweiser, Pepsi, Taco Bell, Nike, Dairy Management (milk), Salon Selectives, Denny's, Miller Lite, Sprite and Snickers. Five of the brands (Budweiser, Pepsi, Nike, Dairy Management and Snickers) were also identified as favorites in the initial

continued on p. 42

Vision care consumers blind to branding

A study by CDB Research & Consulting Inc., New York, reveals that 94 percent of prescription lens wearers cannot name the brand of lenses they own, despite efforts by vision care product manufacturers to market products directly to the consumer.

More than three out of four people (77 percent) have difficulty seeing without corrective lenses — a problem that increases dramatically with age. People who are 55 and older are twice as likely require corrective lenses than adults under 35. As Baby Boomers in America continue to mature, they are demanding more vision care goods and services than ever before. Industry manufacturers have capitalized on the expanding vision care market by developing products that cater to the taste and sensitivities of America's Baby Boom generation. "One area that shows real growth potential is prescription sunglasses," says Dr. Larry Chiagouris, managing director, CDB Research & Consulting Inc. "Only 2 percent of people who wear glasses purchase prescription sunglasses."

Of the 400 people surveyed, 87 percent feel they have access to the best vision treatment possible, an opinion that has not changed over the past year. Eyeglass wearers, however, have some complaints: 38 percent say that the worst part about wearing glasses is that they are hard to keep clean. The second most common complaint (19 percent) is that glasses are uncomfortable to wear. "We found it quite interesting that young people are the most sensitive to their appearance in glasses," says Chiagouris. "People under 35 were four or five times more likely than others to complain that the 'worst part about wearing glasses is that it makes you look unattractive,' " he says. Not surprisingly, 21 percent of people under 35 years of age wear contact lenses exclusively — the highest percentage of any age group. For more information call 212-367-6858.

CfMC

NIPO *Software*

Complete Research Systems

The Script Composer®

A new approach to old arts

Good questionnaire design is a matter of experience and feeling. So is good questionnaire programming. The Script Composer unites the two arts. Market researchers use it to design questionnaires from scratch. Programmers use it to edit complex operations. They only need to know how to click, drag and drop. The Script Composer generates the programs for the CfMC and NIPO Software data collection systems.

Questionnaire programming has never been so easy
- no programming knowledge required
- easy to learn
- powerful, visual questionnaire editor
- fast and easy navigating via tree and text view
- questionnaire library, accessible via ODBC (Open Database Connectivity)
- automatic import of any text file
- generates CfMC and NIPO Software compatible script formats
- conversion from CfMC to NIPO Software script format and vice versa

CfMC and NIPO Software provide hundreds of leading research and fieldwork organisations worldwide with superior software for CATI, CAPI, Web, Panels and Analysis.

A CfMC | NIPO *Software* production

CfMC
San Francisco +1 415 777 0470
New York +1 212 777 5120
Paris +33 1 4084 8485
sales@cfmc.com
www.cfmc.com

NIPO *Software*
Amsterdam +31 20 5225 857
Hong Kong +852 2516 7835
niposoft@nipo.nl
www.nipo.nl

Product & Service Update

Rent a virtual focus group room

Protocon, Inc., New York, has opened the Virtual Research Room (VRROOM) service. Market researchers can now rent virtual focus group rooms like they would traditional focus group rooms. The service is available for any moderator, research company, or corporate marketing or advertising department to conduct on-line studies. The service uses the iSession communication technology from Seattle-based Sessio.com. Clients can view the proceedings on-line, and can secretly ask moderators to direct probing questions during a session. For more information call David Bradford at 212-390-5633 or visit the company's Web site at www.vrroom.com.

Software puts brand testing history into one package

RSC, The Quality Measurement Company, Evansville, Ind., has introduced a new software system which puts all the elements of one brand's market research advertising testing history into one software package. The new software system, outlook Gain, will include the company's ARS persuasion scores (which evaluate a brand's advertising strategy or finished TV commercial), the diagnostic elements which comprise the commercials (i.e. brand differentiation, the use of humor, etc.) and digitized videos of each commercial.

According to RSC, the outlook Gain is designed to allow an advertiser to watch different commercials, compare ads which had high and low ARS persuasion scores and to easily identify specific factors associated with a brand's successful and non-successful ads. With the new software, for example, a brand manager of a popular brand might watch several hundred TV commercials of that particular brand in a few hours as opposed to spending several days exam-

Research Calendar

SPSS MR USER CONFERENCE: SPSS MR will hold its first international user conference, SumIT99, at the Grand Hotel Reykjavik in Reykjavik, Iceland, on April 19-21. The conference will include presentations on topics such as data mining and Web data collection and breakout sessions on Web surveys and data modeling, among others. For more information visit the SPSS MR Web site at www.spss.com/spssmr/sumit99 or the Iceland Tourist Bureau Web site at www.arctic.is/itb/.

LATIN AMERICAN MARKET SEMINAR: Strategy Research Corp. (SRC), Miami, will hold its fifth annual Latin American Market Planning Seminar, themed "Market Planning for the New Century," at the Miami Airport Hilton on April 22 from 8 a.m. to 6 p.m. The presentation of the 1999 Latin American Market Planning Report will include information on 19 countries and 69 urban markets and will include talks by experts in international business and strategic market planning. For more information call 305-649-5400 or visit the SRC Web site at www.strategyresearch.com.

SENSORY EVALUATION WORKSHOP: As part of its workshop series "Issues in Sensory Evaluation," Tragon Corporation will hold a workshop entitled Descriptive Analysis on May 3-5 at the Sheraton Palo Alto, Palo Alto, Calif. The program will focus on development of a descriptive capability; subject selection and training, sensory language development; test design and analyses, comparison of QDA and other methods. For more information call 650-365-1833 or visit the company's Web site at www.tragon.com.

AAPOR ANNUAL CONFERENCE: The American Association for Public Opinion Research will hold its annual conference on May 13-16 at the Tradewinds Resort in St. Petersburg Beach, Fla. For more information vist the organization's Web site at www.aapor.org or call 734-764-1555.

RESEARCH AMERICAS CONFERENCE: The Canadian Advertising Research Foundation and the Advertising Research Foundation will co-sponsor the Research Americas Conference on May 16-18 at the Marriott Eaton Centre in Toronto. Among other topics, the conference will focus on "how much knowledge can and cannot be transferred within the Americas." For more information call 212-751-5656 or visit the ARF Web site at www.arfsite.org.

CLARITAS CONFERENCE: Claritas, Arlington, Va., will hold its annual Precision Marketing Conference, themed "Advancing the Science & Art of Marketing," from May 17-19 at the Fairmont Hotel in Chicago. Sessions will cover customer acquisition and retention, channel management, sales support, Internet marketing and business-to-business marketing. The conference will also feature a trade show and an interactive solutions lab. For more information call 800-678-8110 and press "4" or visit the company's Web site at www.claritas.com.

ENERGY MARKETING RESEARCH: The American Marketing Association will hold a conference on energy marketing research at Adam's Mark Hotel, San Antonio, Texas from May 23-26. For more information call 312-648-0536 or visit the organization's Web site at www.ama.org.

ining individual commercials. This historical research measurement data allows effective selling propositions for one brand to be revised and tested for relevance to related brands in the advertiser's product line-up. RSC's database is estimated to contain more than 50,000 TV advertising strategies and commercials. For more information call 812-425-4562.

New service from Cahners In-Stat Group

Cahners In-Stat Group has launched its Call Center Service, expanding the company's Voice and Data Communications Group, which includes market analysis of the voice messaging, interactive voice response and computer-telephony integration markets. The service will provide market research and analysis covering many facets of the call center industry, including: automatic call distributor (ACD) and other hardware markets; customer contact and customer service software solutions; Internet-enabled call centers; network-based and distributed call centers; emerging technology developments; and international industry issues and opportunities. Headquartered in Newton, Mass., Cahners In-Stat Group is a high-technology market research firm and part of Cahners Business Information, a publisher of specialized business publications. For more information call 617-630-3900 or visit the company's Web site at www.instat.com.

Ketchum updates PR research guide

The 1999 edition of "A Guide to Public Relations Research," a 90-page research reference manual for PR professionals, is now available from Ketchum, a New York public relations firm. The publication has been expanded to include sections on PR measurement and evaluation and selected PR research computer software packages, in addition to an expanded listing of worldwide secondary data sources and bibliographic references, including Web addresses. The guide, prepared and updated by Walter Lindenmann, senior vice president and director of Ketchum's research and measurement department, contains eight major sections, including a checklist of things PR practitioners ought to consider whenever they do research and a comparison of six different types of research approaches that are often used in public relations. It also contains a glossary of terms commonly used in PR research and a bibliography. The manual is available for $25 per copy. Checks or money orders should be made payable to "Ketchum Research and Measurement" and sent to Walter Lindenmann, Ketchum Research and Measurement Dept., 292 Madison Ave., New York, N.Y., 10017. Purchase orders are not accepted.

New projector from InFocus

InFocus, a Wilsonville, Ore., maker of

continued on p. 48

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

Work with a full-service research firm that explores, understands and answers the diverse cultural and linguistic questions that are vital to the design, execution and analysis of every project.

Domestic and International Qualitative and Quantitative Research

(Hispanic, Asian, African American, Native American and General Market)

etc

Erlich Transcultural Consultants

21241 Ventura Boulevard, Suite 193
Woodland Hills, CA 91364

818/226-1333 Fax: 818/226-1338 E-mail: etcethnic@aol.com

Names of Note

In a management restructuring, *NFO Worldwide, Inc.*, Greenwich, Conn., has promoted the following executives to president of their respective areas: **Joseph M. Migliara** - North America, **Dr. Hartmut Kiock** - Europe, and **Patrick G. Healy** - AustralAsia & the Middle East. Migliara was previously president - consumer packaged goods and healthcare. Kiock is the chairman of the management board of Infratest Burke. Healy will continue as chief financial officer of NFO. Previously, Healy was president - corporate products and systems development and chief financial officer, and was also responsible for NFO's operations in the U.K. and Middle East. In addition, NFO has appointed a five-member executive committee that will be responsible for the overall management and coordination of the company's global operations. The committee will be composed of **William E. Lipner**, NFO's chairman, chief executive officer and president; Migliara; Kiock; Healy; and Charles B. Hamlin, president - interactive and technologies group. Within the new management structure, Hamlin will assume additional responsibility for NFO's U.S.-based international research group. He will continue his current responsibilities for NFO's interactive and high tech/telecommunications companies and will manage NFO's strategic planning and corporate communications functions.

In other NFO news, **Allen R. DeCotiis**, in order to spend more time with his family, has resigned his position as president of financial services and international operations for NFO Worldwide. DeCotiis will continue to be responsible for the company's domestic travel and leisure business, while overseeing the transition of responsibility for NFO's financial services business and international operations.

Name Creation:
Name Testing.
Best New Product Branding
EDISON
For Information Contact: John P. Hoeppner
602-488-9660
P.O. Box 5587• Carefree, AZ 85377-5587
e-mail: namequest @ aol.com
Name Quest®
The Science of Name Creation

George Conboy has joined *Dialogue Resource, Inc.*, a Fairfield, Conn., research firm, as vice president.

Marypat Corbett has been promoted to senior account representative at *Doane Marketing Research,* St. Louis. She was also named director of international agronomic market research alliances.

Corbett

Steve Phillips and **Surinder Siama** have been appointed vice president in the worldwide services division of *BAIGlobal*, a Tarrytown, N.Y., research firm. In addition, **Larry Herman** has joined the firm as vice president, **Peter Fushan** has been named vice president and **Eileen Kalminson** has been promoted to vice president. **Christopher Batenhorst** was named vice president of the firm's competitive tracking services division.

Douglas Berdie has been promoted to president of the strategic marketing services division of *Total Research Corp.*, Princeton, N.J.

Rudy Bublitz has been named regional sales manager for the Midwest at *DBM Associates*, a Whitehouse Station, N.J.-based provider of interactive voice response data collection systems.

Gary Shaw and **Nora Wittman** have been named senior vice presidents at *FRC Research Corp.*, New York.

Macro International, Calverton, Md., has promoted **Peg Anthony** to vice president.

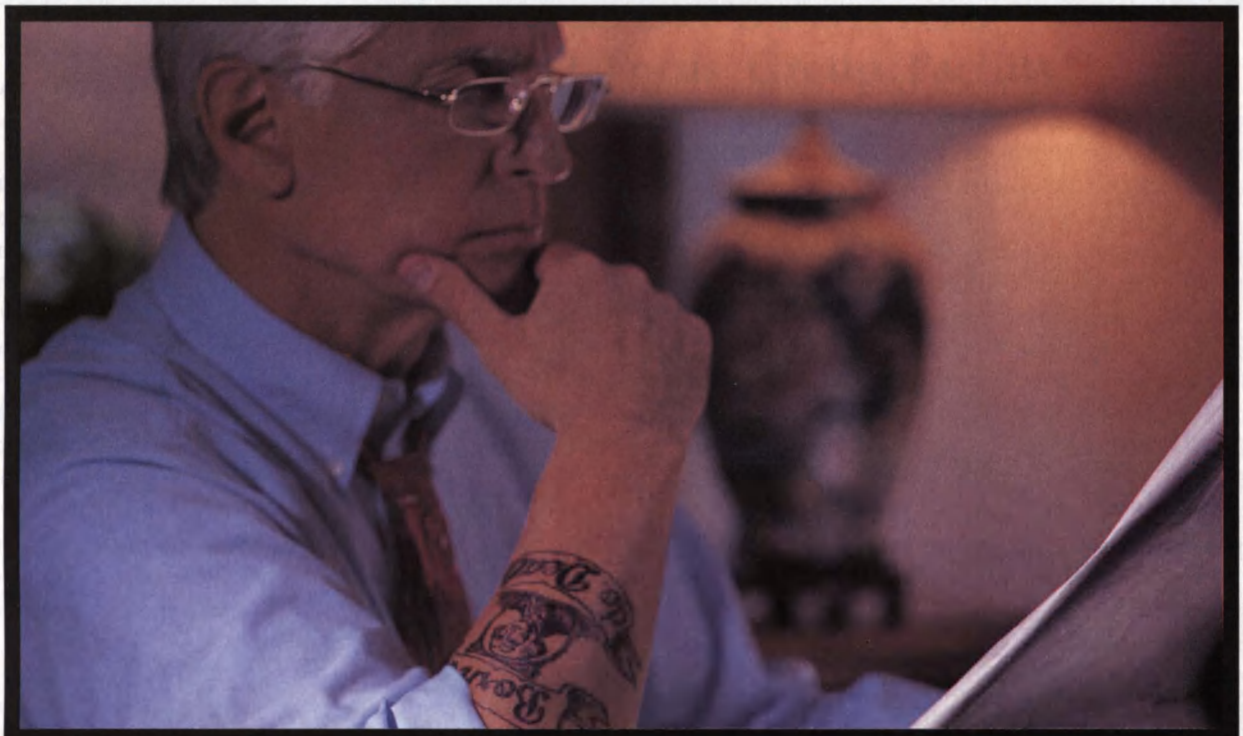
Clearwater Research, Inc., Boise, Idaho, has promoted **Michael Willmorth** to study director/public sector and **Bud Roach** to human resources director. In addition, **Heidi Aldous** has joined the firm as research technical assistant.

Edwin Rupert has been hired by *Brintnall & Nicolini, Inc.*, a Philadelphia-based health care consulting and research firm, as senior research associate.

Michael Richarme has been named vice president/client services at *Decision Analyst*, an Arlington, Texas, research firm. Also, **Elizabeth Horn** has joined the firm's statistical science group.

The Arbitron Company, New York, has changed its advertiser/agency services division in Los Angeles. **Alisa Joseph** has been named national manager, consumer information services; **George Brady** has been named Western manager, advertiser/agency services; **Debbie Lahm** has been promoted to account manager, advertiser agency services; and **Stacie DeArmas** has been named product training specialist.

The Quest Business Agency, a Houston marketing communications firm, has added **Stephanie Litwins** as research analyst.



INVESTMENT BANKERS WITH TATTOOS

Find Them Faster and Easier.
And Find Them for Less.

POLK'S RESEARCH SAMPLING

With over 200 demographic and lifestyle characteristics and purchase behavior ranging from automobiles to wines, Polk's Research Sampling delivers the most accurate and targeted samples, saving you time and money. By dealing with Polk directly, you go straight to the source. No middleman, so there's no markup on the best information available. Our experienced account executives understand your market research objectives and will customize your order with a full array of selects, cutbacks and data delivery options. Faster, easier and for less. For more information on Polk's Research Sampling call toll free 888-225-1434.

Polk®
Multi-Dimensional Intelligence™

Research Industry News

CMS Research, a Toledo, Ohio, interactive voice response (IVR) research service bureau, has licensed ARCS, an IVR data collection and recruiting system from DBM Associates, Whitehouse Station, N.J. DBM Associates and CMS Research will administer conference satisfaction surveys at the Advertising Research Foundation Convention and InfoPlex show on March 15-17 at the New York Hilton.

NFO Worldwide, Inc., Greenwich, Conn., has implemented a new structure to manage its global operations. The company has been organized into three strategic segments — North America, Europe, and AustralAsia & The Middle East — with a separate president responsible for each segment. In addition, the operations of the segments will be coordinated and harmonized by a newly appointed executive committee. (*See this month's Names of Note section for more information on the individual appointments.*)

Clearwater Research, Inc., Boise, Idaho, reported total billings for 1998 at just under $3.6 million, up 70 percent from 1997. In the last eight years, annual growth has been over 50 percent each year.

BAIGlobal, a Tarrytown, N.Y., research firm, has branded its qualitative research division under the name of Qualitative MarketView. BAIGlobal designed the brand based on input from its qualitative clients. Qualitative MarketView will also serve as the qualitative division of Market Facts Inc., BAIGlobal's parent company.

SSI-SECURITY

OBJECTIVE:

Sampling service that I can take for granted.

SSI SOLUTION:

Michele Dreczynski (Research Systems Manager at **Leo Burnett** in Chicago) — "The sample is the cornerstone of our research...it's got to be right. Getting the sample in a timely manner is critical. I can call Jessica in the morning to help me define my sample, and within two hours, I have the sample on my modem account!

"I can't think of another supplier that I work with more closely than Survey Sampling. I know the sample will be pulled correctly and within my specified time frame. With Survey Sampling, I can take the sample generation process for granted!"

Call SSI for sampling solutions at (203)255-4200.

Survey Sampling, Inc.®

Partners with survey researchers since 1977

ACNielsen Corporation, Stamford, Conn., reported 1998 operating income, net income and earnings per share each increased by more than 50 percent. Net income rose 59.4 percent, to $57.2 million, while diluted earnings per share reached $0.96, an increase of 54.8 percent over the prior year. Reported earnings include an after-tax expense of $9.2 million, or $0.15 per share, for Year 2000 system modifications, and a negative after-tax impact of $8.1 million, or $0.14 per share, from foreign currency translation.

A new research firm, **Global Quest Inc.**, has opened at 50 Portugal Cove Rd., St. John's, Newfoundland, A1B 2L9, Canada. For more information contact Melissa Miller, president, at 709-726-4251 or at globalquest@nf.sympatico.ca.

Principia Products, Inc., a manufacturer and distributor of optical mark reading technology for survey processing, has moved to 16 Industrial Blvd., Suite 102, Paoli, Pa., 19301. Phone 800-858-0860. Fax 610-647-8771.

Total Research Corporation, Princeton, N.J., announced second-quarter and six-month results for the periods ending December 31, 1998. The firm reported record revenues of $9,625,625 for the second quarter and net income of $539,486, or diluted earnings per share of $.04. This compared to net income of $407,525, or $.03 per share on revenues of $8,749,086 for the same quarter in the prior year. Net income grew 32 percent and revenues by 10 percent over the same three-month period of the previous fiscal year. Net income for the first six months was a record

continued on p. 81

MORPACE International
FOCUS GROUP STUDIOS
"Michigan's Finest Focus Group Facility!"

Focus Group Studio

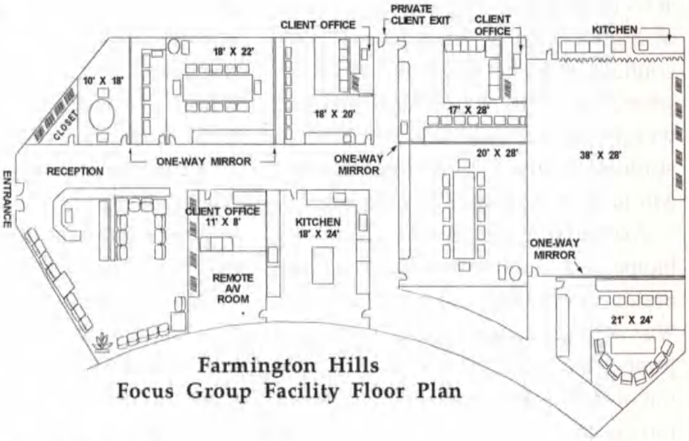
Observation Room

Focus Group Studio Services:

- FULL RANGE OF SERVICES include moderating and multiple city project management.
- STATE-OF-THE-ART FACILITY includes three spacious focus group studios and two one-on-one interviewing rooms.
- SPACIOUS VIEWING ROOMS combine tiered seating and writing tables with living room comfort. Floor-to-ceiling observation mirrors, wet bar, refrigerator and private office. Private client exit.
- QUALITY RECRUITING to your specifications.
- BROADCAST QUALITY VIDEO EQUIPMENT, S.M.P.T.E. time code.
- MEMBER GroupNet™ providing video conferencing utilizing PictureTel Concorde 4500.
- FULL SERVICE KITCHEN, gourmet catering.

In Addition, MORPACE Offers Data Collection/Data Processing:

- 210-line CATI-equipped interviewing stations.
- Bilingual interviewers.
- Sophisticated in-house data processing capabilities.


CLIENT OFFICE
PRIVATE CLIENT EXIT
CLIENT OFFICE
KITCHEN
18' X 22'
10' X 18'
CLOSET
18' X 20'
17' X 28'
ONE-WAY MIRROR
ONE-WAY MIRROR
20' X 28'
38' X 28'
RECEPTION
ENTRANCE
CLIENT OFFICE 11' X 8'
KITCHEN 18' X 24'
REMOTE A/V ROOM
ONE-WAY MIRROR
21' X 24'

Farmington Hills
Focus Group Facility Floor Plan

For more information, call Amie Saltzman at:

MORPACE International, Inc.
31700 Middlebelt Road, Farmington Hills, MI 48334 • 1-800-878-7223

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.

Gary Silvers of *Modern Maturity* magazine reports conducting a focus group with seniors on magazines. A particular respondent always provided the same answer to all the questions he was asked. For example, when asked why he read a particular magazine, he explained, "Because Jesus told me to." When asked why he read particular articles within the magazine, again, "Because Jesus told me to."

This answer was not very helpful to the client, who realized in order to reach this type of respondent, he'd have to target Jesus in advertising.

A lot of interesting people show up at focus groups. Moderator Saul Cohen of Saul Cohen & Associates reports conducting a chewing tobacco group, where one of his respondents was man weighing over 400 lbs., dressed in studded leather, who revealed that Mu'ammar Khaddafi was his hero!

Wonder how often the following happens, as it did to an unnamed moderator: after being told a focus session was being videotaped, a woman jumped up, covered her face, and ran out of the facility, stating she could not participate in the session if it was taped!

A criminal? An Amish person? A terribly vain individual?

Janet Pizzarello from Sorensen Associates recently found again how shoppers at the point-of-purchase are willing to be really honest in answering survey questions. In an observation and in-store intercept study, consumers were being interviewed about the reasons they purchased certain products from the infant toy sections of a mass merchandiser. One man explained, "My wife just dropped our $300 digital phone in our swimming pool and I was trying to find a toy phone juvenile enough to give her as a Christmas present. I looked at the Barney phones but they weren't childish enough. This one from Fisher-Price is just perfect!"

Researcher Jag Nair reports a focus group he was involved with, led by a female moderator, where one male participant, for reasons unknown to the moderator, kept talking about his sex life. She tried to change the subject, but he persisted. She finally succeeded when she asked what the product category under investigation had to do with his sex life. He couldn't muster a response.

Some people think everything has to do with sex. Also, some wives of columnists think that's the way their husbands think. [*Some editors and some readers might agree with some wives of columnists.*-Ed.]

Doug Conwell of the *Tampa Tribune* tells about a potential respondent who told the interviewer that she couldn't do a survey because she was naked. In my book, this is not a good reason for not participating in a survey, unless it's a door-to-door survey. Or a mall intercept.

Moderator Louise Kroot-Haukka reports conducting a group with women — at least they were all dressed like women — including one person Haukka was sure wasn't a woman. Or not all woman. Haukka still doesn't know if her respondent was a transvestite, a cross-dresser, or a hermaphrodite. Haukka reports that he/she was a wonderful respondent who other respondents looked up to, at least in terms of opinions of the food category they were discussing.

Haukka also reports conducting a group session with men where consumers had to taste a food product served in individual bowls. As they began eating, one man pointed out, "It's moving!" Haukka thought the movement was simply liquid in the bowl, but then others in the group also noticed what turned out to be small bugs crawling in the bowls.

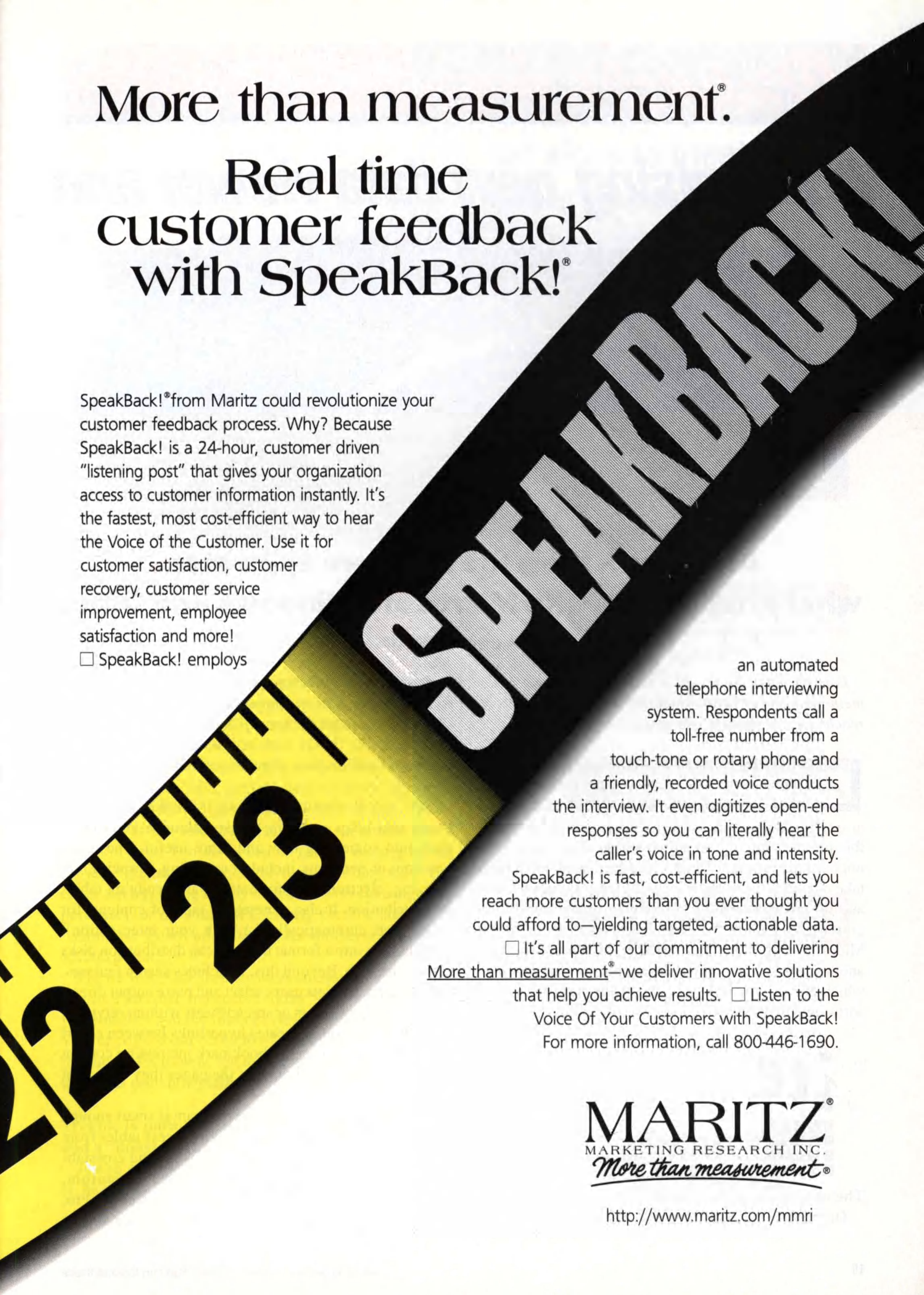
Soon, the discussion inevitably turned to the extra protein the product now contained. After Haukka explained that the bugs weren't supposed to be there, the conversation went on as normal.

The men did cease tasting the product, however.

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.

More than measurement®

Real time customer feedback with SpeakBack!®



SpeakBack!® from Maritz could revolutionize your customer feedback process. Why? Because SpeakBack! is a 24-hour, customer driven "listening post" that gives your organization access to customer information instantly. It's the fastest, most cost-efficient way to hear the Voice of the Customer. Use it for customer satisfaction, customer recovery, customer service improvement, employee satisfaction and more! ☐ SpeakBack! employs an automated telephone interviewing system. Respondents call a toll-free number from a touch-tone or rotary phone and a friendly, recorded voice conducts the interview. It even digitizes open-end responses so you can literally hear the caller's voice in tone and intensity. SpeakBack! is fast, cost-efficient, and lets you reach more customers than you ever thought you could afford to—yielding targeted, actionable data. ☐ It's all part of our commitment to delivering More than measurement®—we deliver innovative solutions that help you achieve results. ☐ Listen to the Voice Of Your Customers with SpeakBack! For more information, call 800-446-1690.

MARITZ®
MARKETING RESEARCH INC.
More than measurement®

http://www.maritz.com/mmri

A promising new data viewer and publisher from ISPC Software

Also, news from the software epicenter: what's happening with Microsoft, Windows and Office

By Steven Struhl

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

Last month, we promised you a fascinating look at new developments at Microsoft — fascinating, that is, assuming you're interested in that sort of thing. We also started our last review with a discussion of the incredible proliferation of new software. Those of you who do not have the February *Quirk's* readily at hand will have to take our word for it that it included weighty ruminations, and the usual dosage of facile sarcasm and poorly disguised accusations. We fully intended to focus on the Microsoft story this time. However, as you will see, still another worthy software title came to our attention — which proves how right we were about the rapid pace of software development.

The new product: ite from ISPC

The product that we discovered, and which many of you doubtless would find very useful, is called ite. This comes from a smaller, not-yet-famous London-based company, ISPC. Once you get the hang of using this program, it can do remarkable things with crosstabulated reports that could well add an extra dimension to the work you produce.

ISPC's ite Professional actually is a linked set of programs that takes ordinary crosstabulations and makes them into something new and more useful. The many functions it performs include organizing, sprucing up, indexing, electronically formatting, and readying tables for distribution. It also generates a table of contents for your report automatically (or with your intervention), and puts data into a format that you can distribute on disks or over the Web. Beyond this, it includes search features, makes charts, and lets users select and paste output directly into word processors or spreadsheets without retyping. In the Web version, it creates hyperlinks between report pages, and allows users to bookmark interesting content or even to make scrapbooks of the pages they find most informative.

There's more. In addition, the program is smart enough (with a little prompting from you) to process tables from nearly any source. These include statistics and crosstabulation programs (such as SPSS, SAS, Quantum, Microtab, Mentor, or PTT) or databases (such as FoxPro, Delphi, Access and Oracle). Its authors claim it even can handle the output from many "home-grown" programs written in FORTRAN, Pascal, awk, and so on. There is one small caveat here, namely that you must do a little preprocessing with tables from recent versions of SPSS. The program now creates tables as objects rather than as text, so you must first get SPSS to export the tables to the ASCII format before using ite to add all its extra features.

This program clearly fills a need, but how to categorize what it does is another matter. If you use the ite system, you can clear away those awful volumes of crosstabs (that seemingly accompany every study) from your desk and your clients' desks. You also can put an end to the hours you typically spend searching through paper documents, by using ite's efficient tables of contents, indexing and searching. In the bargain, you can save dozens to thousands of trees, depending on how many paper-based sets of tables you normally distribute.

Since ite's maker ISPC is based in England, we are presuming that users there find meaning in this program's subtitle, "the electronic fiche," that your reviewer does not. At the moment, the best description I can come up with is "electronic table organizer and distributor, with neat search, formatting, and Web features," or perhaps "Hondo, supreme boss of crosstabulations." I'm afraid, though, that these terms mostly show why I am not making my living as a creative writer. Maybe ISPC should open a contest to find a new descriptive handle for this program.

Very alert readers with highly retentive memories may notice some similarities between this program and the SPSS Smart Viewer discussed in the last issue. However, as ite accepts output from many programs, and it adds useful features like tables of contents and indexing, it clearly does more than view output.

If you wish to think of ite as a competitor to the SPSS Smart Viewer, though, then ite wins on price. This does not mean that the program is exactly free, though. The ite Publisher is not sold, but licensed for an annual fee of $1,800 a year. You also need to get the accompanying browser to send copies of the reports to anybody. You either can buy a single copy of this for $399 (as a one-time purchase), or do what ISPC clearly prefers, and get an "unlimited" distribution license for another annual fee of $2,200 a year.

The ite Web Publisher is sold as an extension to the regular ite Publisher and costs another $1,800 a year. When you consider that the Internet version of the SPSS Smart Viewer costs about $20,000 — and this does not include free upgrades to new versions, then you will start to see that ite is something like a mid-price solution.

Trouble in paradise: areas of DOS prompt operation and a "dongle" required

Just so you know this is a typical effort by your reviewer, here come some complaints about this program. While

continued on p. 49

TELENATION offers a complete line of related services to meet client needs.

TELE•NATION
National Telephone Research
★ 3,000 interviews weekly
★ Fastest available turnaround

TELE•NATION® Overnight!
Custom Telephone Research
★ Results in 24 hours
★ Flexible and responsive

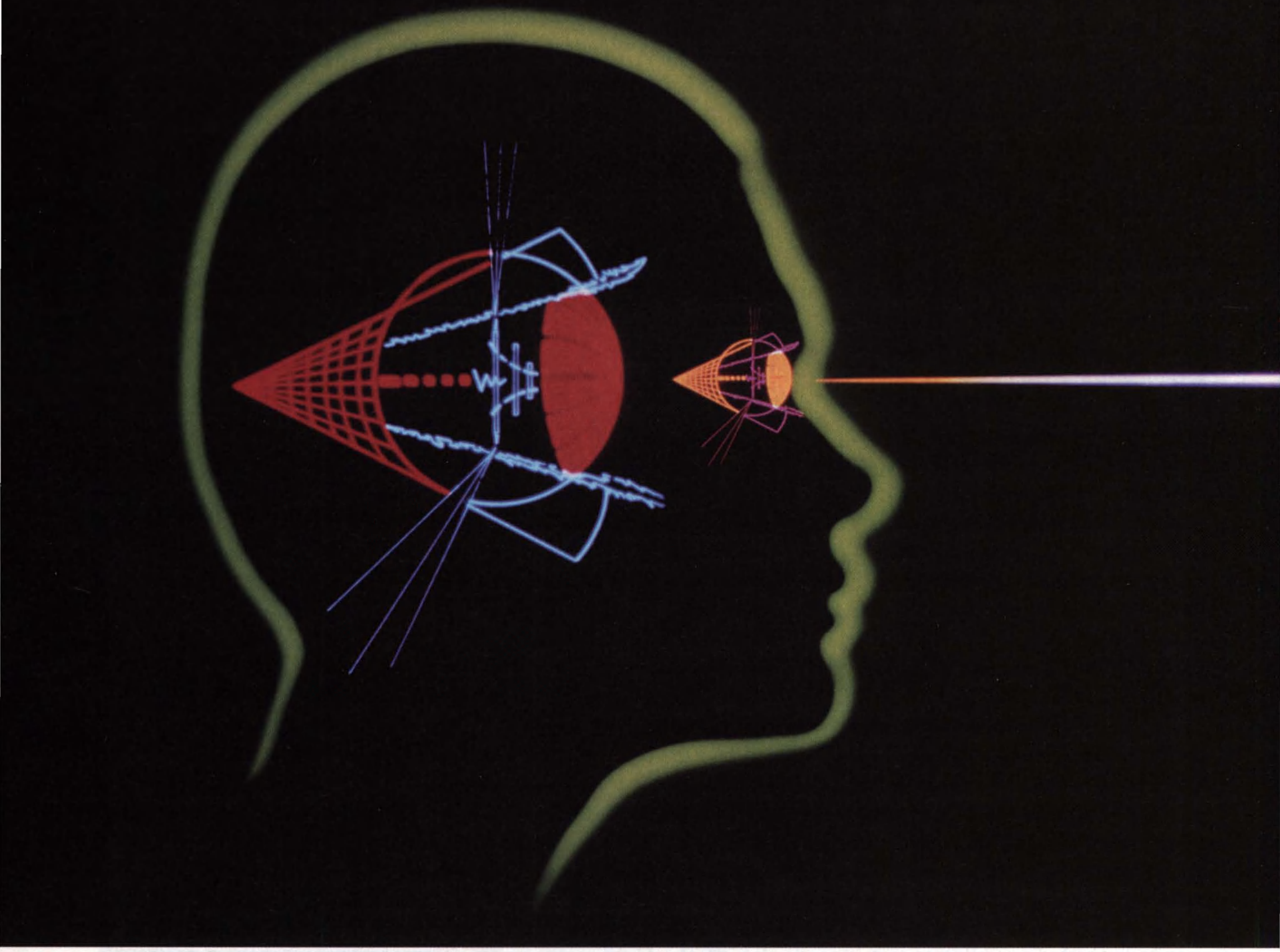
TELE•NATION® Tracker
Multi-Wave Telephone Research
★ Affordable tracking research
★ Straightforward results

TELE•NACIÓN®
U. S. Hispanic Telephone Research
★ Surveys top U.S. Hispanic markets
★ Experienced guidance

TELE•NATION®
National Telephone Research
★ 1,000 adult Canadians
★ Twice monthly frequency

Call your Market Facts representative, or **Tom Mularz** at (847) 590-7238.

A service of MARKET FACTS®



In the minds of many advertisers, if you want a television ad to be its most effective, you place it on a show watched by a lot of people in your target market. But what if certain shows, from ratings winners to also-rans, do a better job of engaging their viewers? And what if that engagement carries over to the commercials, thereby enhancing their ability to communicate and persuade? Is your commercial better off being seen by fewer — but more involved — viewers?

These were just some of the questions behind "Engaging the Viewer," a study conducted last summer by Starcom Media Services, the media division of Leo Burnett advertising in Chicago. "A big issue at the moment in the media industry, among people buying and selling television time, is about the value of program environment," says Kate Lynch, research director of Starcom. "Does the right environment make people pay more attention to the commercials? Different kinds of programs attract different levels of attention. Does that have an effect on attention to the commercial breaks and then on people's recall or awareness or what they take away from the commercials?"

Using NASA-developed technology administered by Blue Bell, Pa.-based Capita Systems Inc., a subsidiary of Capita Research Group Inc., Starcom used brainwave analysis to measure respondents' involvement in a TV show and a series of commercials, to find out if their engagement in the show carried over to the ads that followed it. "I've been looking for different technologies or methods to try and evaluate [involvement] for years. We've done day-after recall studies, we've done focus groups, we've done lots of different things. But [using brainwave analysis] interested me because it was a truly objective measure and something that we could do a pilot study on quite easily," Lynch says.

Contrary to the *ER*-like imagery it conjures, Capita's brainwave measuring equipment is non-invasive and doesn't require affixing pads to wor-

Effectiveness by association?

Study seeks to determine if a TV viewer's involvement in a program carries over to ads

By Joseph Rydholm, QMRR editor

ried brows with sticky gels. Rather, the apparatus resembles a pair of headphones, says David Hunter, president and CEO of Capita Systems. "We have improved the NASA technology with a new headset on which we have a patent pending. It takes EEG measurements continuously from the surface of the head and converts them into an ENGAGEMENT INDEX^{SM} [EI] five times per second through a proprietary algorithm NASA developed during 10 years of research. We define engagement as the amount of electrical activity in the cognitive portion of the brain," Hunter says.

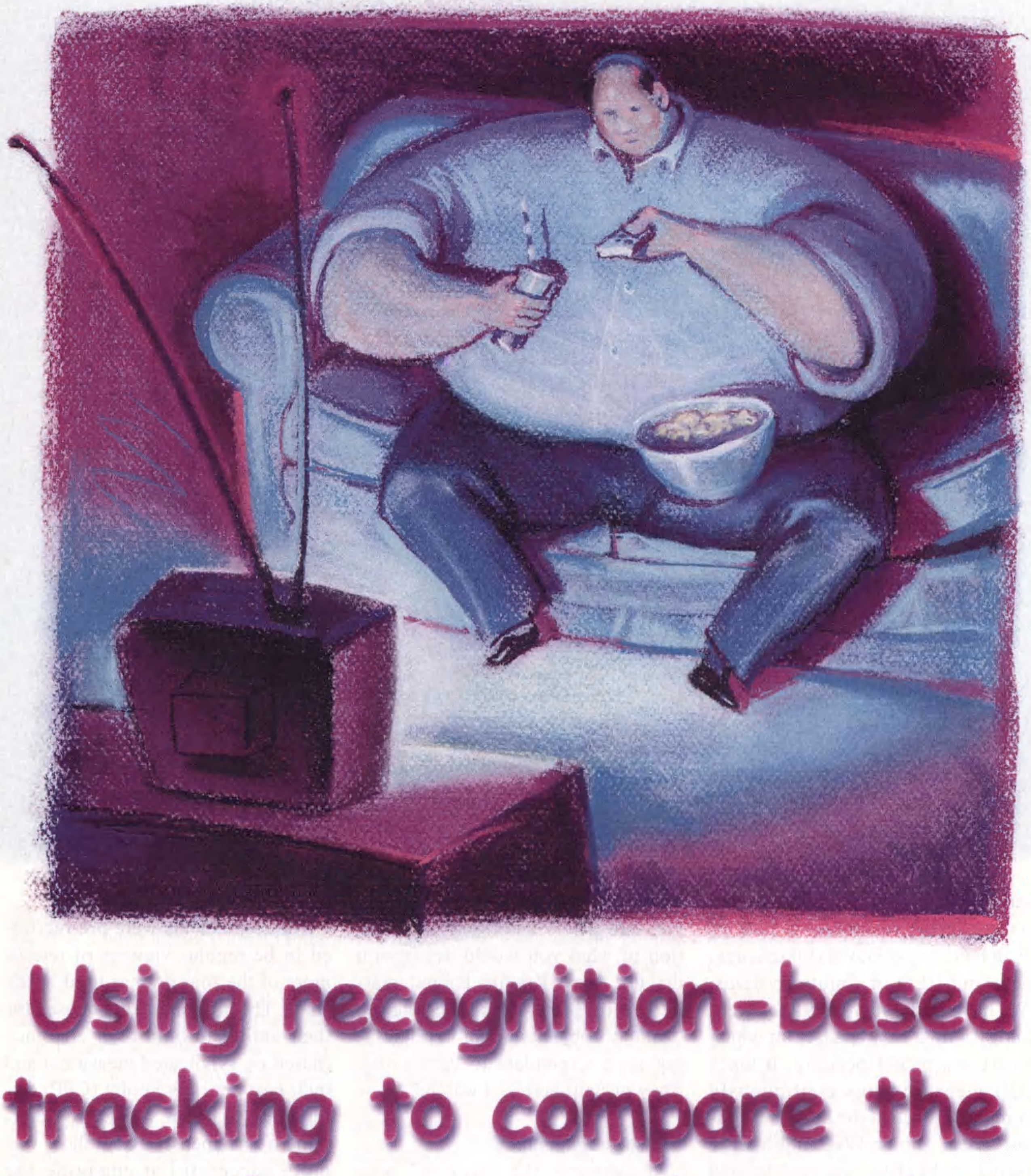
"In terms of methodology, it has some aspects of what you would see with a dial test but we feel that this measure offers additional information to what you would get from a dial test," says Kristina Farago, marketing director, Capita Systems. "And, it's objective. You're not relying on a respondent to turn a dial. They just sit there and watch."

Viewer engagement

"Engaging the Viewer" was designed to find out if different programs produce different levels of attention/involvement; if different attention levels carry over into the commercial break; and if viewer engagement has an effect on communication or recall of the advertisements.

The respondents were pre-recruited to be regular viewers of one or more of the four dramas used in the study. The programs were chosen for their ability to hold their audience (based on syndicated measures) and their cost per rating point (CPP) differential. Starcom wanted to determine if an expensive CPP show was more successful at engaging the viewer than a cheaper CPP show, and if so, by how much. "We were finding, using our media data, that the cheaper programs were very cost-effective, but clients would say they still wanted to be in the expensive prime-time programs because people

continued on p. 66



Using recognition-based tracking to compare the ROI of print, radio and TV

By Donald E. Bruzzone and Lizabeth L. Reyer

Editor's note: Donald E. Bruzzone is president of Bruzzone Research Company, Alameda, Calif. He can be reached at 510-523-5505. Lizabeth L. Reyer is market research manager at BlueCross BlueShield of Minnesota, Eagan, Minn. She can be reached at 800-382-2000. This article is based on a presentation made before the Advertising Research Foundation Conference in New York on October 26,1998. The full article was published in eXperts Report on Media Research — Information or Currency?: Print; TV; Interactive and Accountability. *October 1998. Copyright 1998 Advertising Research Foundation.*

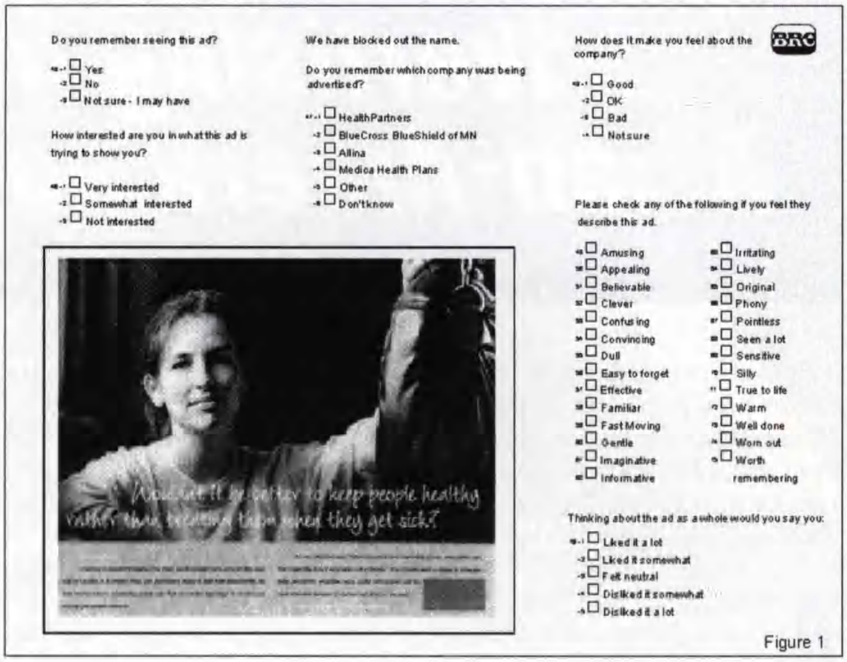
It is very common to have campaigns that include advertising in a variety of media: print, radio, TV, etc. It is not as common to have a good answer to the question "Which is best? Which reaches and affects people at the lowest cost?" In short, which provides the most "bang per buck" for my product, in my markets, today? Can you even make valid comparisons of the impact of ads and commercials?

This is a case history from a continuing recognition-based tracking study by BlueCross BlueShield of Minnesota that shows a way to answer all of these questions.

Ever since health insurance became so competitive with the introduction of HMOs and all the other new forms of coverage, BlueCross BlueShield of Minnesota became very serious about marketing and the role of advertising. They weren't sure they wanted to go along with the conventional wisdom about the need for advertising and the types of advertising that worked best. They wanted solid evidence.

A team from BlueCross BlueShield of Minnesota looked at the more traditional telephone tracking surveys where you ask if people recall seeing or hearing any advertising for health care plans, and if so, which ones. They had two major concerns about that approach.

First, it is not very accurate or precise. When somebody says they recall your advertising you don't know if they recall your present advertising or your previous advertising. Or even if it is your advertising. They could be remembering your competitors' advertising. When a person looks at an ad and says "Yes, I recognize that as an ad I have seen before," you have a much more accurate and discriminating measure of the advertising they were actually exposed to.


Wouldn't it be better to keep people healthy rather than treating them when they get sick?

Do you remember seeing this ad?

☐ Yes
☐ No
☐ Not sure - I may have

How interested are you in what this ad is trying to show you?

☐ Very interested
☐ Somewhat interested
☐ Not interested

We have blocked out the name.

Do you remember which company was being advertised?

☐ HealthPartners
☐ BlueCross BlueShield of MN
☐ Allina
☐ Medica Health Plans
☐ Other
☐ Don't know

How does it make you feel about the company?

☐ Good
☐ OK
☐ Bad
☐ Not sure

Please check any of the following if you feel they describe this ad.

☐ Amusing
☐ Appealing
☐ Believable
☐ Clever
☐ Confusing
☐ Convincing
☐ Dull
☐ Easy to forget
☐ Effective
☐ Familiar
☐ Fast Moving
☐ Gentle
☐ Imaginative
☐ Informative
☐ Irritating
☐ Lively
☐ Original
☐ Phony
☐ Pointless
☐ Seen a lot
☐ Sensitive
☐ Silly
☐ True to life
☐ Warm
☐ Well done
☐ Worn out
☐ Worth remembering

Thinking about the ad as a whole would you say you:

☐ Liked it a lot
☐ Liked it somewhat
☐ Felt neutral
☐ Disliked it somewhat
☐ Disliked it a lot

Figure 1

Secondly, ad recall does not do a very complete job in identifying those actually reached by the advertising. The team was impressed with the evidence showing the number that can recognize advertising they have seen before is two to three times greater than the number that can recall that same advertising from memory. When you are trying to see if the advertising affected the people who noticed it, recognition gives you a much more complete picture of the number who actually noticed it.[1]

The team was also impressed with the evidence on the limitations of recall-based research from two major industry-wide studies in the early '90s. First was the ARF's Copy Research Validity Project. It showed the standard day-after recall test, which had been the standard of the industry for over a quarter of a century, didn't perform much better than flipping a coin when you were trying to predict if Commercial A was going to be better than Commercial B.[2]

That created enough of a furor that a second industry-wide study based on a larger collection of the same kind of expensive, but highly reliable, split cable tests addressed the issue: IRI's "How Advertising Works."[3] The evidence was the same, but the conclusion was stated even more strongly. Ad recall was not related to sales.

BlueCross BlueShield of Minnesota didn't want to spend any more than was necessary. So they also

continued on p. 67

Keys to successful advertising in the Asian-American market

By John McKay

Editor's note: John McKay is senior vice president at Data & Management Counsel, Inc., a Chadds Ford, Pa., research firm. He can be reached at 918-492-6324 or at JMcKay4DMC@aol.com.

Advertising can play a crucial role in making Asian-Americans feel welcomed and appreciated. Because so few national firms currently advertise to Asian-Americans, the few who do are building tremendous brand loyalties in their category. To reach Asian-Americans effectively, they must be made to feel the ad is directed to them and that they are the audience. Culture-based, in-language advertising is the key.

Mainstream ads are in English, yet most Asian-Americans are not completely at ease with the language. When they open an Asian-language newspaper, few if any mainstream marketers communicate to them with ad copy in their native language. Research findings from numerous research studies have consistently substantiated the powerfully positive impact in-language marketing communications have on Asian-American customer attitudes, corporate image perceptions and purchase behavior.

Sensitivity and understanding on the part of the marketer are required to deliver ads that appeal to the many Asian nationalities. Marketers should not assume they know how a particular group likes to be portrayed in advertising. They must avoid using cultural stereotypes in advertising, store displays and sales literature, and avoid imposing anything patronizing, condescending or gratuitous in the marketing message. Marketers should also avoid communication mistakes by identifying any differences in the meaning of words and phrases among subgroups. By keeping these considerations in mind, marketers can create a positive image in their advertisements to the Asian-American community.

Asian-Americans are impacted by distinctly different cultural themes than the general American population. Advertising messages that are effective with mainstream audiences may not work with Asian consumers, so there is a need to tailor the marketing message to involve and impact the Asian customer. While each Asian

"...beyond our wildest expectations"

That's how one of the world's largest survey research firms describes their experience with PRO♆T♆S, our new computer assisted dialing and interviewer management system.

- Proven – with an installed base of nearly 1,500 interviewing stations across 20 sites nationwide.
- Financially sensible – productivity increases will return your investment in six months or less.
- Practical – can eliminate the need for separate PBXs.
- Flexible – presents a full range of dialing options from manual to a research-sensitive predictive mode.
- Modular – provides the add-on functionality you need, such as: remote monitoring, open-end or even full interview recording, integration with high-end PBXs, IVR, inbound/outbound, administrative functions and ACD.
- Research compatible – the first system created and supported by data collection and survey research professionals.

There's much more...

either call us the old fashioned way, at: **1.800.336.7674**

or visit our Web site: **www.pro-t-s.com**

TELEPHONY PRO♆T♆S SYSTEMS

Another innovative research product from

Marketing Systems Group

Creators of the GENESYS Sampling System

Philadelphia, PA • Lincoln, NE • Los Angeles, CA

Why Choose Anyone Else in Chicago?

When WE offer...

CONVENIENCE

- *Easy to reach via phone, fax and e-mail.*
- *Bids in under 1 hour.*
- *5 minutes for O'hare Airport.*
- *Daily reports via fax, on your desk in the morning.*
- *A recruiting center open 80 hours a week.*
- *Video conferenceing compatible with all systems.*
- *Easy to read color MSExcel profiles updated daily.*

COMFORT

- *Leather adjustable swivel chairs and couch.*
- *Three tiered observation rooms that seat 16.*
- *Private communications rooms with phone and e-mail access.*
- *Top end audio and video systems with fail safe backups.*

EXPERIENCE

- *Mature and Responsive Qualitative Assistants that are consistently applauded for their service.*
- *Personable and highly experienced management staff.*

PRECISION RESEARCH

847•390•8666 or
info@preres.com

culture has different nuances, all share common traits: reverence for family, a high level of responsibility, respect for elders, honoring traditions, importance of unity and harmony. Ads that incorporate these cultural themes are likely to win the respect and appreciation of most Asian cultures:

1. Importance of family. Ads aimed at most Americans seem to emphasize personal choices, independence, and leisure time outside the family — themes that appeal to American society where individualism is valued. Yet these advertising strategies are likely to be less impactful among Asian groups. In contrast to mainstream families, ads aimed at Asian-Americans should instead emphasize family unity as a means to achieve financial success and social status.

Asians are highly family-oriented and typically include an extended family within one household. Many Asian cultures believe strongly in community and avoid any notoriety for individuals. There is a saying in these communities that "the nail that sticks up gets hammered down." Thus advertisers should avoid showy displays of personal wealth or individuality.

Advertising to Asian-Americans should instead portray the family as the focus of daily life. Men and women should be portrayed in traditional gender roles. The decision-maker in the house is usually the mother, and the product should not offend her sensibilities. A more effective advertising message for all Asian groups would be to position the product as helping to improve family health and lifestyle.

2. Cultural heritage. Acknowledge the group's heritage and uniqueness and the company's respect for that heritage. Since most Asian-Americans are first-generation and conservative in their social and political views, ads should incorporate an appeal to their strong motivation to achieve prosperity. The Asian immigrant tends to respond most favorably to ads that recognize their need to both meld with their adopted society and to remember what they left behind. An advertiser should focus on the ways in which its product or service can enrich the Asian customer's life and serve as a symbol of prestige.

3. Corporate history, size and stability. Asians have great respect for qualities such as company size, age, and stability which give ads an air of credibility to Asians. Ads which demonstrate a company's long history, sound financial structure, and dependability are more likely to succeed with Asian-Americans than with mainstream customers, as Asians tend to have a greater inherent trust for the familiar.

Asians are highly family-oriented and typically include an extended family within one household. Many Asian cultures believe strongly in community and avoid any notoriety for individuals. There is a saying in these communities that "the nail that sticks up gets hammered down." Thus advertisers should avoid showy displays of personal wealth or individuality.

4. Subtlety and tradition. Subtlety

and tradition are positive themes that tend to appeal more to Asian-Americans than to mainstream audiences. For example: AT&T bluntly tells mainstream America "We want you back," but it politely informs Japanese Americans in Japanese that "We are waiting for your call." Advertisers should also be alert for mixed messages in their products or promotions. Many Asians follow numerology, for example, so an innocent combination of numbers in a promotion could have hidden meaning to the targeted Asian audience.

An ad must be positioned so Asian-American customers can identify culturally with it. If, for instance, a beverage ad shows two young Caucasian men playing sports, few Asian-Americans would pay attention to it. The ad could be effectively targeted to Asian-Americans by portraying two Asian men drinking the beverage at a picnic with their family. The ad would have a greater impact on, and a higher level of recall among, the large majority of Asian-American customers who saw it, as it integrates familiar and motivating themes of family, culture and tradition.

The focus of advertising targeted to Asian-American consumers should be on developing brand loyalty and market strength through in-language and culture-based marketing programs that are linked back to the Asian-American community. In developing advertising targeted to Asian-American consumers, it is important to make sure the following considerations are incorporated in the campaign:

- demonstrate recognition and respect for their cultural heritage;
- communicate in Asian languages via media channels they use;
- emphasize customer education rather than the "hard sell";
- incorporate culturally significant occasions, themes, or items;
- tailor the message to the culture, language, and needs of the target segment, so they will identify with the ad and recognize that they are the target audience.

What makes people do what they do?

No one has all the right answers.
At least you can learn all the right questions.

Call Kim Barnette at 1-800-806-0183 for a course catalog.

MODERATOR TRAINING FUNDAMENTALS
Feb. 1 - 3, 1999 Atlanta
May 17 - 19, 1999 Cincinnati
Aug. 2 - 4, 1999 San Francisco
Oct. 25 - 27, 1999 Chicago

INTRODUCTION TO DATA ANALYSIS
Jan. 25 - 27, 1999 San Francisco
March 29 - 31, 1999 Cincinnati
June 14 - 16, 1999 Atlanta
Sept. 13 - 15, 1999 Chicago
Nov. 8 - 10, 1999 Los Angeles (Manhattan Beach)

INTRODUCTION TO MARKETING RESEARCH
Jan. 11 - 13, 1999 Atlanta
Feb. 8 - 10, 1999 San Francisco
March 15 - 17, 1999 Dallas
June 21 - 23, 1999 Chicago
July 26 - 28, 1999 Washington, D.C.
Oct. 4 - 6, 1999 Los Angeles (Manhattan Beach)
Dec. 6 - 8, 1999 Cincinnati

MEASURING & MANAGING CUSTOMER SATISFACTION & LOYALTY
Jan. 25 - 27, 1999 Dallas
April 19 - 21, 1999 Chicago
July 19 - 21, 1999 Cincinnati
Oct. 4 - 6, 1999 Washington, D.C.
Nov. 29 - Dec. 1, 1999 San Francisco

DESIGNING & IMPLEMENTING EMPLOYEE SURVEYS
Jan. 11 - 13, 1999 San Francisco
June 7 - 9, 1999 New York
Oct. 18 - 20, 1999 Cincinnati

DESIGNING EFFECTIVE QUESTIONNAIRES
March 22 - 24, 1999 New York
June 28 - 30, 1999 Cincinnati
Aug. 9 - 11, 1999 Chicago
Nov. 15 - 17, 1999 San Francisco

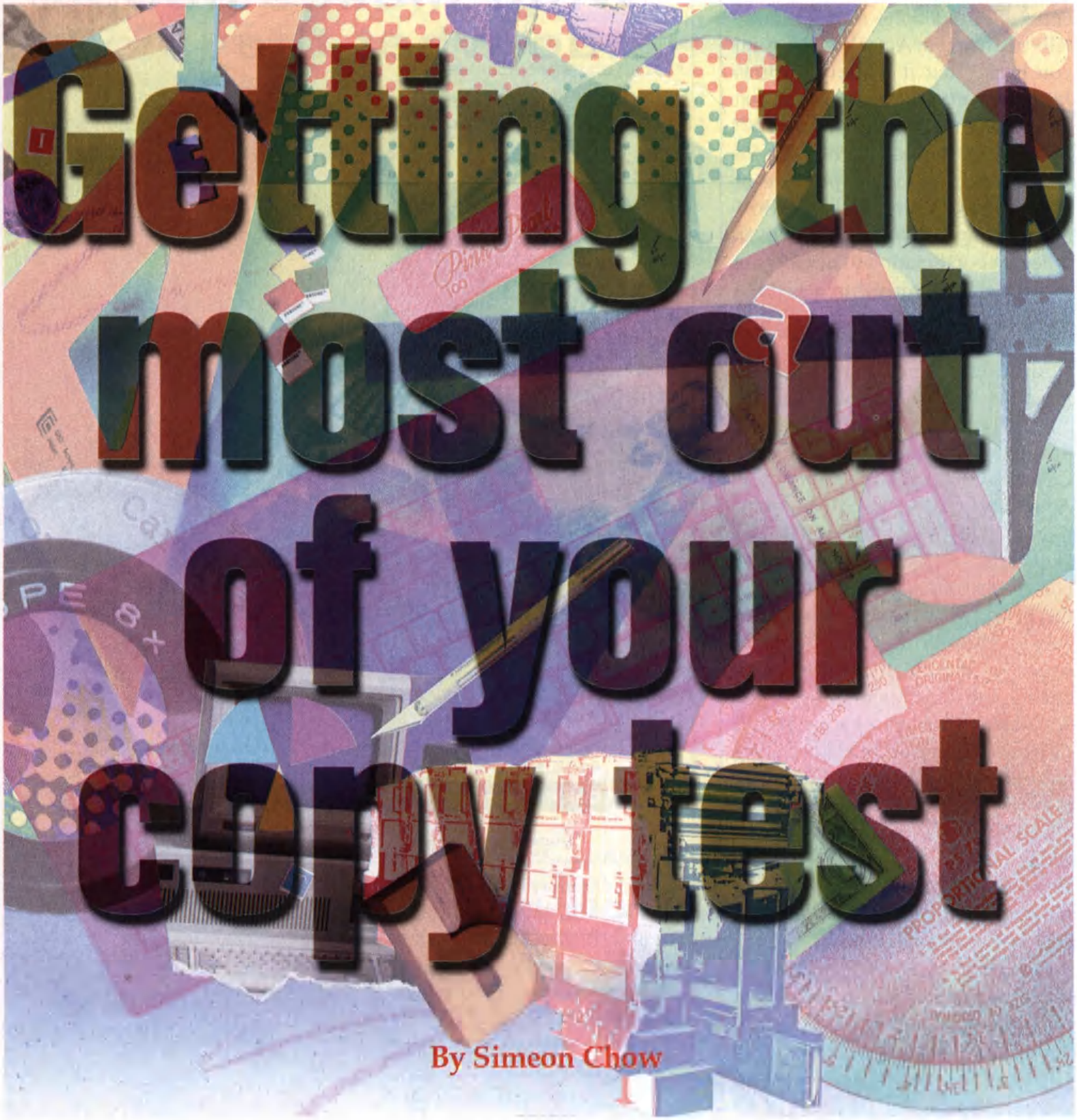
TRAINING FOR FOCUS GROUP MODERATING: APPLICATIONS & APPROACHES
March 1 - 4, 1999 Atlanta
May 24 - 27, 1999 Cincinnati
Aug. 16 - 19, 1999 San Francisco
Nov. 15 - 18, 1999 Chicago

APPLIED MARKETING RESEARCH
Feb. 22 - 24, 1999 Atlanta
June 28 - 30, 1999 Cincinnati
Oct. 11 - 13, 1999 Chicago

MARKETING APPLICATIONS OF MULTIVARIATE TECHNIQUES
April 12 - 14, 1999 Chicago
Aug. 30 - Sept. 1, 1999 New York
Nov. 29 - Dec. 1, 1999 Cincinnati

CONDUCTING INTERNATIONAL RESEARCH
Feb. 1 - 3, 1999 San Francisco
July 12 - 14, 1999 Chicago
Oct. 11 - 13, 1999 Cincinnati

Burke
THE TRAINING & DEVELOPMENT CENTER
www.burke.com/training



Getting the most out of your copy test

By Simeon Chow

Editor's note: Dr. Simeon Chow is vice president, director of intellectual capital, at New York-based Audits & Surveys Worldwide. He can be reached at schow@surveys.com.

A conflict exists between the ability of traditional advertising testing methods to provide creative guidance and diagnostic information while at the same time aiding management with the crucial decision of whether or not to use the advertising. This problem has stimulated firms to seek methods capable of helping both the development of advertisements (concurrent-development research) and the determination of which of several executions should be used in a campaign (post-development testing). Toward this goal, we report the development of a measurement approach and model designed to estimate the impact of variations in advertising copy on beliefs, attitudes, and purchase intention.

This measurement approach is guided by three important considerations: (1) the constraint of extending standard copy-test methods without needless complexities or burdensome added cost; (2) the necessity of grounding our procedures in well-developed, hierarchy-of-effects communications theory; and (3) the ultimate goal of providing managers with an actionable copy assessment procedure which provides richer diagnostic information than more traditional techniques. The primary benefits of this new approach

The smart source for data collection.

Location http://www.qcs.com ▼

Focus Groups

Telephone Interviewing

Pre- Recruiting (CLT)

Mystery Shopping

Auditing

Data Processing

QuikCall System™ (IVR)

FocusVision® Video Conferencing

Project Management

QCS

Connect with QCS. It's the one company that best meets your marketing information needs.

QCS offers Focus Groups, Telephone Interviewing, Pre-recruited Central Location Testing (CLT), Auditing, and Mystery Shopping. All are available nationwide from one source, with consistent, reliable data, and quality service.

Our Central Project Management Team can also coordinate every aspect of fielding your project, including pricing, scheduling, field management, and tabulations. We free you to concentrate on your business, and your client needs.

Whether your project is large or small, you can be assured that QCS is the smart source with the resources, skills, and experience to handle it right.

So connect with QCS.
Call 1-800-325-3338.

Quality Controlled Services®
Pay us a virtual visit at http://www.qcs.com

are its diagnostic insights by:

- providing creative guidance for the improvement of future copy;
- serving as an aid to judgment for a go/no go decision on copy; and
- relating findings to the overall advertising strategy.

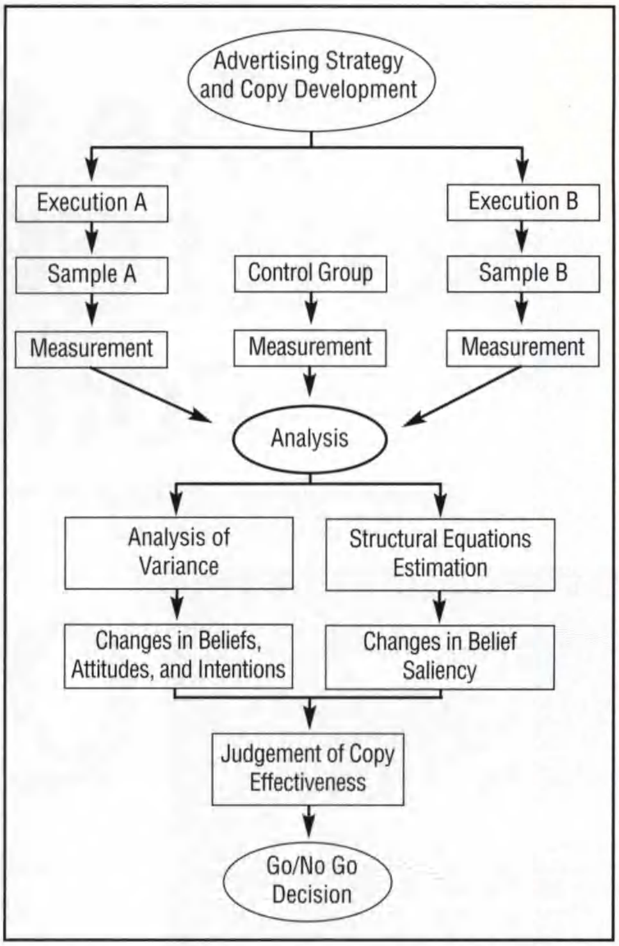
Our copy-testing method, call SEQUENCE (Structural EQUations Estimation of New Copy Effectiveness) extends previous advertising copy-testing research by permitting an assessment of the strength of the linkages among brand beliefs, brand attitudes, and purchase intention without additional data-collection costs. Since comprehension of ad copy is routinely evaluated, and attitude measures taken, we envision this model as a low-cost addition to many standard copy-testing procedures used by advertisers and agencies.

The effects of advertising

Ad testing serves as a check of whether creative executions of advertisements are "on strategy" — that is, that they are capable of producing the communication effects that will achieve the communication objectives and positioning for the brand. Recall (brand awareness) measures have generated controversy over the years and, as a result, are not as influential as they once were. Recall and persuasion are conceptually two very different kinds of advertising effects, and one should never be used as an automatic proxy for the other. Thus, ads are often tested separately for these two effects. However, many in the advertising research community have concluded that persuasion-based measures of ad effectiveness are superior to traditional recall measures.

If persuasion is the desired outcome for effective advertising, then there are five communication strategies possible:

- introduction of new salient criteria used to evaluate brands within a product class;
- changing the saliency of brand beliefs based on existing evaluative criteria;
- changing the strength of these brand beliefs;
- changing the strength of the linkages among brand beliefs, brand attitudes, and purchase intention; and
- changing beliefs concerning competing brands.


Advertising Strategy and Copy Development
Execution A
Execution B
Sample A
Control Group
Sample B
Measurement
Measurement
Measurement
Analysis
Analysis of Variance
Structural Equations Estimation
Changes in Beliefs, Attitudes, and Intentions
Changes in Belief Saliency
Judgement of Copy Effectiveness
Go/No Go Decision

The proposed methodology evaluates all of the above possible communication strategies. The PACT principles (PACT Agencies, 1982) emphasize that sound copy-testing methods should be firmly grounded in communications theory. In the SEQUENCE Model, brand beliefs are viewed as the building blocks of brand image and preference. In order to affect changes in attitude toward a brand, it is necessary to change something about consumers' belief structure with respect to the brand. Therefore, focusing on changes in global measures of brand attitude alone is insufficient to permit an assessment of how or why the observed changes were obtained. Anchoring on global measures of attitude as indicators of success retards the learning process of advertisers and agencies with respect to the reasons for differences in the effectiveness of alternative ad executions.

Our model is also consistent with DAGMAR guidelines (Colley, 1961)

We don't just claim
"honest reliable data",
we guarantee it!

EB
Elliott • Benson
Marketing, Public Policy
& Opinion Research
916/325.1670
www.elliottbenson.com

Sacramento
An Excellent Market
to Research

in that observed communication effects (not exposure or frequency) are evaluated systematically against explicit, communications-oriented, advertising goals. Colley argues that advertising results are best assessed within a hierarchy-of-effects theoretical framework and must be evaluated against advertising goals using benchmark measurements developed prior to implementation. SEQUENCE supports the use of multiple-item measures in a hierarchical framework, thus permitting explicit recognition of how random measurement error may (1) attenuate the precision of estimators and (2) reduce the power of statistical tests of hypotheses. The basic steps in the SEQUENCE copy assessment procedure are depicted in the flowchart.

SEQUENCE assumes the establishment of actionable, communications-oriented advertising objectives and the specification of advertising strategies designed to reach these objectives. At least one execution of the strategy is then developed and submitted to the SEQUENCE testing procedure. In the above figure, two alternative executions are compared to a no-exposure control group; however, more alternatives could have been tested. After exposure to the alternative ads (or without exposure in the case of the control group), multiple measures of brand beliefs, brand attitudes, purchase intentions (and ad attitudes if desired) are collected. These data are then subjected to two types of analysis. First, similar to traditional copy-testing methods, analysis of variance is used to examine differences in the effectiveness of the executions for changing beliefs, attitudes, and intentions. Second, structural equations estimation procedures are used to assess simultaneously the relationships among brand beliefs, brand attitudes, and purchase intentions for each experimental group.

Based on an overall evaluation of the ability of the competing executions to shift beliefs, attitudes, and intentions, and to modify the salience of key brand beliefs in a direction consistent with strategy, a go/no go decision is made. Insights gained from these analyses provide feedback for future copy-development efforts. In sum, we propose an approach to advertising-stimulus measurement and assessment that assumes a learning process and draws heavily on well-established multiattribute attitude theory. Recent advances in covariance structure modeling are applied to evaluate simultaneously the reliability and validity of our measurement model, the strength of modeled relationships, and the overall goodness of model fit.

Repositioning a toothpaste brand: a case study

In this section, we describe a straightforward application of SEQUENCE to the toothpaste industry. For a more technical example and explanation on how specific advertising effects are considered, see Chow, et al (1992).

The advertiser has identified two salient toothpaste benefits, one a cosmetic benefit (tooth whitening and breath-freshening) and the other a pro-

Pick up your pencil and answer these questions...

1. Do you routinely obtain 90% response rates in mail surveys you conduct? ☐ Yes ☐ No
2. Do you know how to avoid the 29 most common errors made in writing questions? ☐ Yes ☐ No
3. Are you confident that data from research you conduct will result in action? ☐ Yes ☐ No
4. Are you confident your questions are reliable and valid? ☐ Yes ☐ No

If you answered no to ANY of these questions...you should attend this workshop.

Questionnaire Design and Use: A WORKSHOP

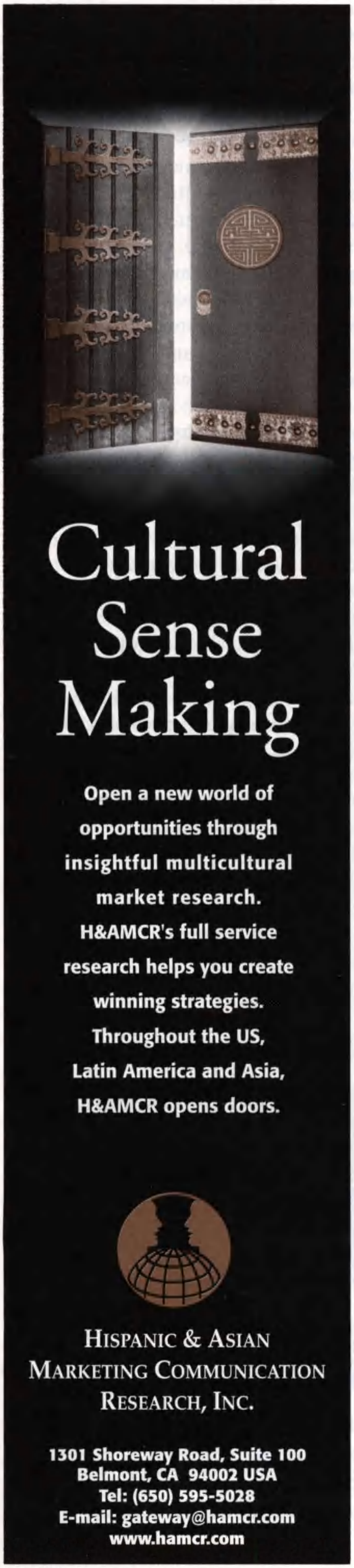
April 15 & 16, 1999 • Bloomington, MN (Mall of America)
May 6 & 7, 1999 • San Diego, CA

A "nuts and bolts," practical workshop that teaches participants to:

- Design and manage market research projects
- Utilize correct sampling techniques
- Obtain high response rates in excess of 90% to mail or telephone surveys
- Construct high quality mail and telephone questionnaires
- Choose appropriate data collection methods

FOR REGISTRATION MATERIALS
OR MORE INFORMATION, CALL:
Ms. Jennifer Koper
1-800-678-5577 or
email: seminar@ana-inc.com
or visit our website: www.ana-inc.com

Anderson, Niebuhr & Associates, Inc.
Northpark Corporate Center • Suite 200
6 Pine Tree Drive • Arden Hills, MN 55112
651/486-8712 • FAX 651/486-0536 • 800-678-5577



Cultural Sense Making

Open a new world of opportunities through insightful multicultural market research. H&AMCR's full service research helps you create winning strategies. Throughout the US, Latin America and Asia, H&AMCR opens doors.

HISPANIC & ASIAN
MARKETING COMMUNICATION
RESEARCH, INC.

1301 Shoreway Road, Suite 100
Belmont, CA 94002 USA
Tel: (650) 595-5028
E-mail: gateway@hamcr.com
www.hamcr.com

tection benefit (cavity prevention and tartar control). The advertiser desires to reposition the brand known for its cosmetic effects as a toothpaste that is also superior with respect to the protection benefit. A successful advertisement should lead to an improvement in average belief strength with respect to protection and a strengthening of the relationship between beliefs about the brand's protection characteristics and attitude toward the brand.

Method

Measures taken from one group after exposure to an execution were compared to the reactions of a control group of people who were not exposed to the ad. Differences on the measures are ascribed to the effects of exposure. A shopping mall intercept sample of 350 respondents was obtained. Two hundred respondents were exposed to the ad, while 150 respondents comprised the no-exposure control group. Likert scales were used to capture the extent of a respondent's agreement with the following belief statements: (1) keeps breath fresh for hours (Fresh), and (2) provides maximum protection against tooth decay (Protect). Brand attitude was measured on a single five-point scale anchored by excellent-poor. Purchase intentions were captured on a single five-point scale anchored by very likely-very unlikely.

Step 1: Test for differences in mean belief strength on the Fresh and Protect beliefs. Differences in mean attitude and purchase intentions scores between the execution and the control group were also tested.

Step 2: Estimate a model with Fresh and Protect as antecedents of brand attitude and brand attitude as the sole predictor of purchase intentions for each of the two groups. Direct comparisons via chi-square difference tests of the strength of the linkages between the variables are made. The objective of these statistical tests is to determine whether or not the ad affected the salience of the target belief, Protect. This is accomplished by comparing the magnitude and the sign of the path estimates between the target belief and attitude for each of the groups.

Step 3: Check to determine if the ad had any unexpected negative effects on the strength or salience of the other brand belief, brand attitudes, or purchase intentions.

Results

As desired, mean belief strength for Protect was significantly stronger for the ad group than the control group (mean = 4.06 and 3.83, respectively; $p < .01$, one-tailed test). Further, brand attitudes (ad mean = 3.47, control mean = 3.18; $p < .01$) and purchase intentions (ad mean = 3.33, control mean = 3.10; $p < .05$) were significantly enhanced by exposure to the ad. The other brand belief, Fresh, was not affected by ad exposure ($p = .28$). These results suggest that the ad effectively communicated the ability of the brand to prevent cavities while not detracting from beliefs regarding its cosmetic properties.

Traditional copy testing procedures often stop with this comparison of means. However, the ad may have had other effects on respondents beyond this observed shift in belief strength. In particular, we would hope that the repositioning strategy also affected the salience of the targeted belief. However, an ad which successfully enhanced belief strength regarding a targeted benefit but which also reduced or eliminated the salience of that benefit to brand attitude would accomplish little. Therefore, it is necessary to test changes in benefit salience, as well as mean shifts. In SEQUENCE, this is done by simultaneously estimating the model described previously using a structural equations estimation procedure. Without complicating the example, we have omitted the description of fit statistics. We note, though, that the model fit the data well.

We begin by examining the effect of ad exposure on belief salience. The key parameters are the regression coefficients reflecting the strength of the relationships between beliefs, Fresh and Protect, and brand attitude.

First, in the no-exposure group, the influence of Fresh and Protect on brand attitude was estimated to be roughly equal (b = .411 and .370, respectively). In the ad group, the influence of Protect on brand attitude was enhanced (b = .542), a result which is consistent with the advertiser's strategy, while the influence of Fresh on brand attitudes remained essentially unchanged (b = .454). A chi-square difference test confirmed that only the increase in salience for Protect was statistically significant ($c2(1) = 5.59$, $p < .05$).

In summary, SEQUENCE analysis revealed in a copy test that the advertisement successfully enhanced consumer beliefs regarding the cavity protection afforded by use of the toothpaste brand. In addition, the salience of the protection belief to brand attitudes was enhanced significantly without adversely affecting brand attitude or purchase intentions. Thus, the path analysis results, in combination with the results of traditional tests of mean differences, provide strong support for the efficacy of the ad.

Reading too much

Through SEQUENCE, the decision on which execution, if any, to adopt is made with more complete information and would depend on the advertiser's evaluation of the total package of effects observed in comparison to a control group. A common problem is reading too much into a copy test result by seizing on one or two multiple comparisons, as is commonly done with ANOVA results. Our example is very straightforward, with only two belief items. However, in many copy tests, a large battery of belief items are assessed by the respondents. The likelihood of falsely concluding that a significant difference exists when it does not (Type I error) increases when multiple comparisons of mean differences are possible and there is no recognition that a certain proportion of comparisons will be significant by chance. This problem is lessened by accounting for all the effects of beliefs simultaneously in a structural equations framework.

SEQUENCE is designed to help management evaluate new copy alternatives before placement. The system is intended to: (1) rapidly predict a new copy's effect on brand beliefs, attitudes, and purchase intentions; (2) produce actionable diagnostic information that can be used to improve the copy execution; and (3) permit evaluation of alternative copy executions. We believe the procedure provides more information with respect to the evaluation of advertising copy than traditional approaches at about the same costs; therefore, its diagnostic value is high.

References

Chow, Simeon, Randall L. Rose and Darral G. Clarke. "SEQUENCE: Structural Equations Estimation of New Copy Effectiveness." Journal of Advertising Research *32, 4 (1992): 60-72.*

Colley, Russell H. Defining Advertising Goals for Measured Advertising Results. *New York: Association of National Advertisers, 1961.*

PACT Agencies. "Positioning Advertising Copy Testing." Journal of Advertising 11, 4 (1982): 3-29.

Field Facts International
and
Video Focus Direct
We're
Bringing
International
Video
Conferencing
Down to
Earth

Field Facts Worldwide

Your partner for worldwide data collection

With global partners who understand quantitative and qualitative research as well as technology

Now brings you video conferencing all over the world at a very affordable price.

Video Conferencing

the high tech and cost effective way to attend a focus group.

Field Facts USA	Field Facts U.K.	Field Facts France	Field Facts Germany
Tel: 508-872-8840	Tel: +44-171-736-6990	Tel: +33-1-53-96-02-10	Tel: +49-69-299873-0
Fax: 508-875-4719	Fax: +44-171-384-1764	Fax: +33-1-53-96-02-50	Fax: +49-69-299873-10

Advertising and packaging:

Your product's voice and face

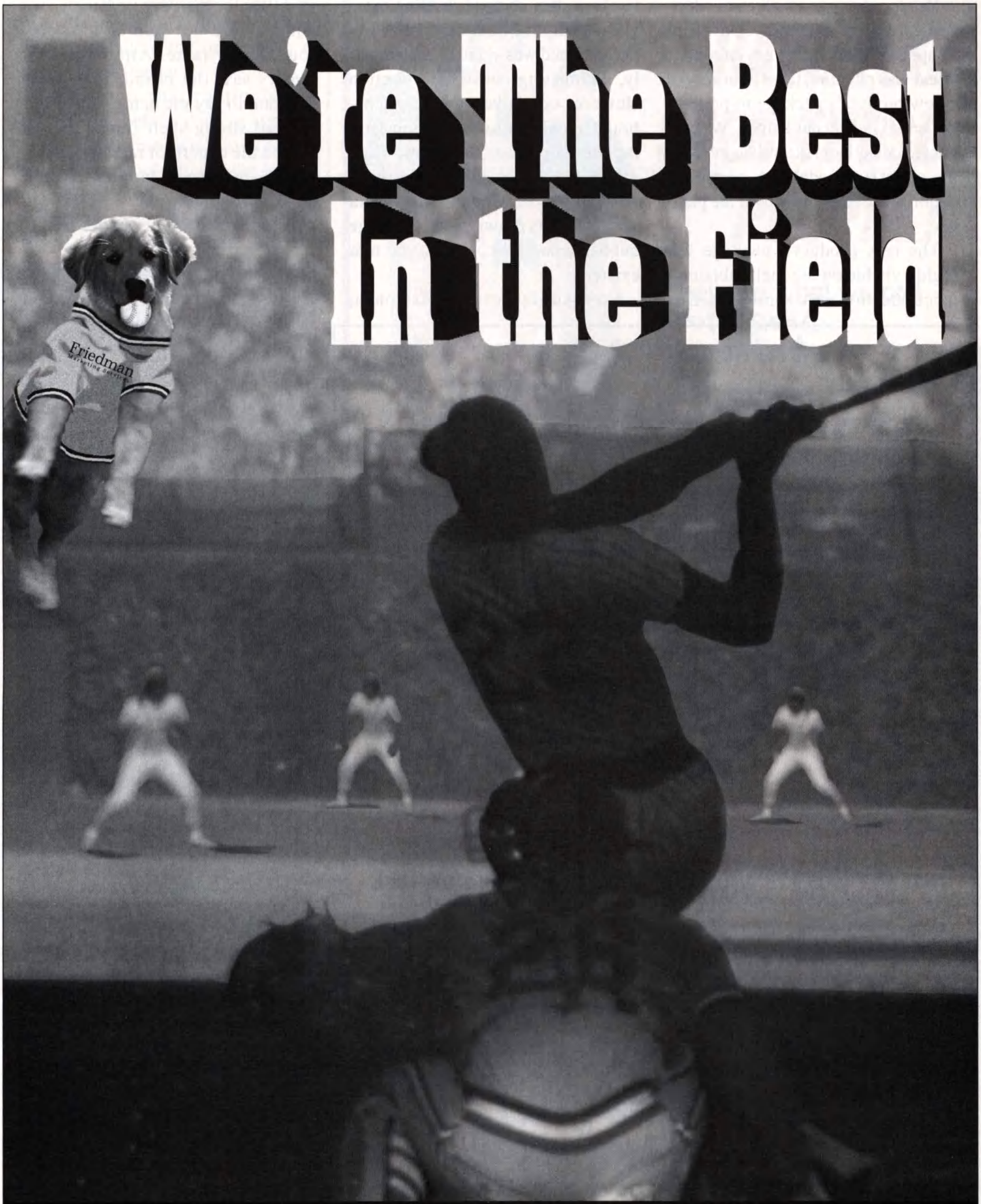
By Gene Leichter

Editor's note: Gene Leichter is president of Leichter Research, Northvale, N.J. He can be reached at 800-700-0707 or at LeichterR@aol.com.

Your product has a name. Advertising gives it a voice. Packaging is its face. All three work together to create an identity.

Advertising, name and packaging should work together to promote your brand. The package should clearly communicate the name and convey the image of your brand. Advertising prominently featuring the package and frequently mentioning the name will help educate consumers, making it easier for them to recognize your product in the store.

We recently copy tested two nearly identical print ad executions. One version included the package, while the other version excluded it entirely. It was no surprise that recall scores, brand image and product ratings were all higher for the ad that included the package. Viewers of the ad that included the package should also have an easier time locating the package in the store.


We're The Best
In the Field
Friedman
Marketing Services

We Cover All Bases

- Mall Intercept
  (30 Locations)
- Executive & Medical Interviewing
- Field Management
- Centralized Modeming

- Coding & Tabulation
- 100 Station CATI
- Focus Facilities
- Pre-Recruit
- Door-to-Door
- Multimedia

Friedman
Marketing Services

Harrison, New York (914) 698-9591 Fax (914) 698-2769

New products need effective advertising to create an identity. Unwilling to spend for adequate advertising, a client was planning to rely entirely on a new product's package to promote the brand in a recent launch. We conducted consumer research to evaluate the visibility, readability, communication and overall impact of the package.

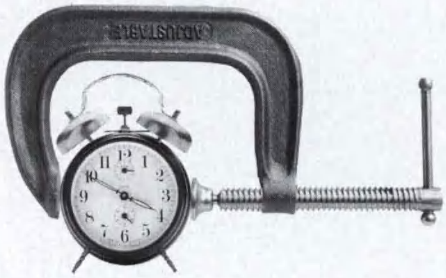
The new product's package was highly visible on the shelf, obtaining quick attention from consumers. Eye-tracking data showed that the brand was usually the first one noticed on the shelf and was studied more intently, dominating consumer attention. However, cognitive measures such as brand recall and recognition from tachistoscope tests were low. There was a disconnect between visibility and cognition. Consumers' visual attention was drawn to the package, but brand name recognition was nonexistent.

Communications questioning about the brand revealed that consumers were not sure how to pronounce the name. Although consumers saw the brand, they were reluctant to say the name. The package had strong shelf impact, but it needed the benefit of radio or television advertising to familiarize consumers with the name.

Companies that routinely test advertising before it is shown will make major modifications to the package or label without the benefit of consumer input. As I recently told a client who had asked about the need for package testing, "What good are high brand recall scores and purchase intent ratings if they can't find your package on the shelf?"

In the last example the marketers had more than half the battle won. The true challenge is to develop packaging that has shelf impact and is easy for consumers to find. The store shelf is a critical battlefield for your brand. Over one third of all packages are not noticed by consumers viewing a shelf

Pressed
For
Time?



Trust the experts with your next qualitative project.
With just one phone call you can book a multitude of qualitative services. Expert national field management, multiple city scheduling and bidding, along with technical expertise in **VIDEOCONFERENCING** and 100% compatibility with any standard videoconferencing equipment.

GroupNet
THE VIDEOCONFERENCING EXPERTS
Simple. Effective. Smart.

Call us now! 1-800-288-8226 **www.group-net.com**

Atlanta, Jackson Associates, Inc. **Boston,** Boston Field & Focus Performance Plus. **Baltimore,** Chesapeake Surveys, Inc. **Charlotte,** Leibowitz Market Research Associates, Inc. **Chicago,** (Downtown) National Data Research , Inc. **Chicago,** (Northfield) National Data Research , Inc. **Cincinnati,** QFact Marketing Research, Inc. **Denver,** AccuData Market Research, Inc. **Detroit,** MOREPACE International. **Houston,** Opinions Unlimited, Inc. **Indianapolis,** Herron Associates, Inc. **Los Angeles,** (Beverly Hills) Adept Consumer Testing, Inc. **Los Angeles,** (Suburban) Adept Consumer Testing, Inc. **Minneapolis,** Focus Market Research, Inc. **Philadelphia,** Group Dynamics in Focus, Inc. **Phoenix,** Focus Market Research, Inc. **San Diego,** Taylor Research **San Francisco,** Nichols Research, Inc. **San Francisco,** (Suburban) Nichols Research, Inc. **San Jose,** Nichols Research, Inc. **Seattle,** Consumer Opinion Services, Inc. **Tampa,** The Herron Group of Tampa, Inc. **Washington D.C.,** Shugoll Research, Inc.

and over two thirds of all purchase decisions are made in the store. These facts underscore the importance of strong shelf impact.

Companies that routinely test advertising before it is shown will make major modifications to the package or label without the benefit of consumer input. As I recently told a client who had asked about the need for package testing, "What good are high brand recall scores and purchase intent ratings if they can't find your package on the shelf?"

Package testing is often used to determine if current users can find new packaging or to measure the visibility and shelf impact of a new package. To determine which new package designs should be tested, marketers need to understand how consumers will view and react to the new package designs. They should always take the time to see it in the way consumers will experience it, on the shelf next to the competition.

A leading OTC brand that dominated its category and occupied most of the shelf space allotted was considering a new package design. The objective of the design change was to create a unified packaging system for the brand using one color. It was hoped that the new design would heighten visibility, while achieving a cleaner, more modern look. All of the current packages in the category, including theirs, were very dark. The decision was made to make the new design white, to heighten contrast with the competition.

One look at the test shelf and it was obvious that the new design would not have the desired impact. The new white package design created a "billboard" highlighting the dark packages of the competition. By changing to a white design, they would be relegating their brand to the background, focusing attention on the competition.

Your product has a name. Advertising gives it a voice and packaging is its face. Your job is to make sure it doesn't get lost in the crowd!

HAVE YOU SEEN THESE PEOPLE?

They are what we call professional respondents.

Chances are, you have seen them and you probably will see them again. They like to work for you. It's a great second income, and it's easy. They are the ideal respondents. They are exactly what you're looking for. Always.

Not only are they in your focus group facility's database, but their names are most likely in many of the neighbouring facilities' databases. We all know they exist.

Sigma's Name Bank™ can help focus group facilities clean our their professional respondents

For twenty years, Sigma has been your "cop on the block." Helping to catch professional respondents is our business.

We know that many focus group facilities are reluctant to use the Duplicate Number Search®. Sigma's Name Bank is the only way for competitive focus group facilities to clean up their databases without "showing their hand."

Help insure quality by asking your research facilities to participate in Sigma's Name Bank program.

CALL 1-800-733-7748
FOR A FREE BROCHURE

SIGMA VALidATION

THE INDEPENDENT OBJECTIVE THIRD PARTY since 1978.

Seven signs of fallout from the information explosion

By Stephen R. Elson

Editor's note: Stephen R. Elson is president and CEO of Pine Company, a Los Angeles information processing and data management firm. He can be reached at 310-815-5700.

"The faster things change, the more information we need to deal with it." (Alvin Toffler, author of *The Adaptive Corporation*, *The Third Wave* and *Future Shock*.)

As a nation, we've shown ourselves to be world masters at generating information. Pack more stats, more facts, more bytes into every minute: this is the course to which much of American business has committed itself. Our entire society may, in fact, be founded on the American standard of information. As Thomas Jefferson put it: "The informed citizen is the cornerstone of democracy."

Information can thrill us, motivate us, and change us. It can be as valuable as gold. Right now, however, we are at war with information. The language of combat shows up again and again in terms such as information explosion, information sickness, data smog, and information fallout.

Here are some — but indeed not all — the signs of information fallout:

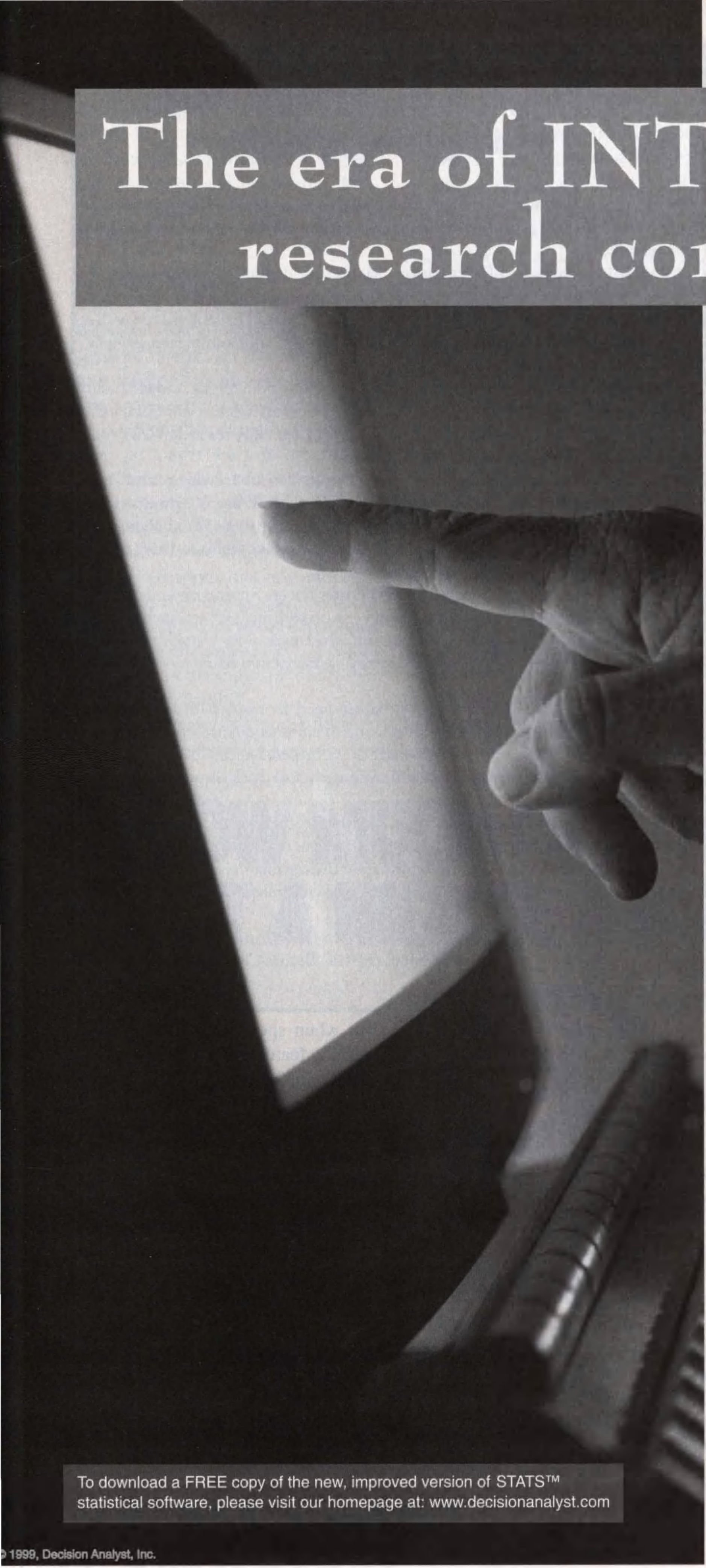
1. Despite all the information at your command you seem to know more and more about less and less. In his superb article in *Technology Review*, ("Data Smog: Surviving the Info Glut") David Shenk quotes pollster Andrew Kohut as saying that data-crowded people "throw their hands up and say, 'Well, I'm going to focus on this very narrow part of the world.'" Shenk says the Internet promotes this trend, and further "This response is one reason for the troubling level of social polarization plaguing the United States. We face a paradoxical spiral in which the more information we come upon, the more we narrow our focus and retreat into different spheres of knowledge. We are, as writer Earl Shorris says, 'A nation of lonely molecules.'"

2. Your information has become self-generating and you can't stop it. Too much unfiltered information is a brain-freeze. It becomes gobbledygook. The inevitable mental response is decision avoidance.

3. You've invested in a new workstation with a built-in treadmill — and you're working overtime to pay for it. We've learned to say no to drugs and limit our intake of junk food but we haven't learned to say no to information.

4. Your attention span is getting shorter. I repeat, your attention span is getting shorter.

5. You've stopped long-range thinking. So much information is available on any given topic that energy can be wasted on solving the smaller stuff, so that we never get a chance to raise our eyes and look into the distance, or out the window.



The era of INTERNET research cometh!

Decision Analyst, Inc.,
an innovator in marketing research methods for over two decades, leads the way to the speed, power and reach of the Internet with these advanced research systems.

- ■ **CopyCheck®**
  The low-cost system to evaluate early-stage creative.
- ■ **CopyTest®**
  The comprehensive advertising pretesting system for TV, print and radio.
- ■ **Conceptor™**
  The complete new product concept-testing system.
- ■ **Optima™**
  The in-home product testing system.

These industry-leading, Internet-based research systems are executed via Decision Analyst's Internet panel of over 250,000 consumers in the U.S. and Canada.

Call 1-800-ANALYSIS
or visit our website at:
www.decisionanalyst.com

Decision Analyst, Inc
Leading the way in Internet research system

To download a FREE copy of the new, improved version of STATS™ statistical software, please visit our homepage at: www.decisionanalyst.com

© 1999, Decision Analyst, Inc.

FIRST,

MARKET RESEARCH.

First Market Research helps its clients "get the facts" with:

- **Focus-group rooms in downtown Boston and downtown Austin**
- **National telephone interviewing -paper & pencil or computer aided with remote monitoring**
- **Special expertise in:**
  - **business-to-business**
  - **high technology**
  - **consumer research**
  - **health care**
- **Multivariate analysis & affordable conjoint designs**

The common-sense comma.
It turns our name into an agenda.

http://www.firstmarket.com

1-800-FIRST-1-1
1-800-FIRST-TX

First
Market
Research

656 Beacon Street, Boston, MA 02215
(617) 236-7080
2301 Hancock Drive, Austin, TX 75756
(512) 451-4000

A case study of our information society: the deregulation of utilities

By virtue of the insulation enjoyed through lack of competition, utility companies have had to cope with far less information than other businesses that compete for share of a market.

Marketing demands differentiation. Marketing demands communication. Differentiation and communication are information-dependent. Suddenly — relatively speaking — utilities have been forced to take a crash course in making friends with a public to whom they previously only sent a bill. With good information management, that bill can become a marketing device.

But relationships take work. To make matters even more interesting, modern marketers now must approach consumers not as manageable masses, but as whimsical individuals. That means more information, more strategizing, more research. New products and promotions. More data. . .

Consider Kenneth Lay, CEO of Enron, for example. Here is a man in search of relationships in a big way. A *Business Week* article with Gary McWilliams' byline presents Lay as "the most visible and feared advocate of opening the nation's $215 billion retail electricity market to competition." It targets his desire to make Houston-based Enron "a champion retailer" in markets all over the country.

If Lay is on the right track, the 600-person Enron Energy Services division formed last year will move rapidly to fulfill its mission — to develop retail services such as long-term, fixed contracts that would offset the risk of dramatic price changes, or a program that would allow customers to roll energy payments into home mortgage payments.

Good, innovative thinking. But has Lay backstopped his people with a plan for the day-to-day business of managing the vast amounts of information that testing and marketing these service concepts will generate? Is he prepared to build the databases which will not only support promotional mailings but tie back to provide valuable analysis?

He ought to be anticipating, right now, the stress level of managers who'll have to review this future data surge and make recommendations that higher-ups depend upon to make growth decisions. A simple information management system that automatically reports data not as numbers but as more easily assimilated charts and graphs is one tool that could help alleviate this problem.

And if Lay isn't thinking in these terms, there is a good chance one of his competitors — like Stephen W. Bergstrom, president of rival Electric Clearinghouse Inc. — is.

6. You've made mistakes based on contaminated data. The partner of this symptom is loss of faith in gut instincts.

7. In order to keep up, your life consists of the immediate past and the immediate future — you have no time for the present moment.

Just how widespread is the problem? In his book of essays, *Burning Down The House*, educator Charles Baxter says this about our dilemma:

"In postmodernism, speed and information, combined through data processing, have moved into cyberspace. It is no wonder that the metaphor of the superhighway has stuck and has become an instant international cliché. But when speed is made to be the defining feature of action, violence is usually not far away, violence defined here as the loss of control under conditions of great velocity. . . .Our fascination with violence is equal to our fascination with data processing: they are two coins in the same pocket."

Baxter goes on to equate the potential danger and violence of speed with the necessity of coping with information. He points up the anxiety and tension computer workers frequently display, and believes that their very stillness enhances the perceived speed by which information travels. Yes, stillness is very much our modern posture, whether in front of computer terminal, movie screen or windshield.

The challenge now is not to produce more data faster — although we will — but to make more intelligent and productive use of information through new and improved processing, linking, visualization and management techniques.

Decisions, decisions

In a 1996 article in *The Humanist*, Richard R. Nethe coined the term "data tsunami." Nethe, for 30 years an advisory quality engineer specializing in data analysis for IBM, states "It's not . . . surprising that so many of our decisions no longer work in the modern environment that we have created . . . that so many of our decisions, even when made on reliable data, turn out to be wrong. We are simply not designed to make decisions that take into consideration the long-range effect, nor are we equipped to handle a multitude of factors simultaneously. . . . Speed and volume are now favored over integrity and depth."

Yet, although the sociosocietal effects of overabundant information look messy, we had the intelligence to create the Information Age in the first place and we have the intelligence to contain and direct it, if we so desire. If we turn our finest and most creative thinkers loose to solve the next challenge of the information age we can discover how to make information our servant, not our master.

Here are six ideas you can start with to begin clearing up information fallout. Of course, the ideal solution is customized solutions to specific problems, but this is a start.

1. Take regular information breaks. Look at all your information sources — cell phone, fax, PC, television, newspaper, Internet, e-mail — and assess what's essential and what is superfluous. If you're getting the same information over and over, turn something off.

2. Get a fresh perspective. Call in the experts. There are companies whose entire reason for being is to domesticate the information monster. Let them do their job and make it easier and more productive for you to do yours.

3. Ask yourself not, "What's next?" but "What's right?" Are you contributing the problem or to the solution? Be honest.

4. Learn what others are doing successfully to reduce "the data tsunami." Learn how to stop receiving unwanted e-mail, get off junk mail lists, or as David Shenk does, put your television in the closet except for preselected viewing hours. Don't be subject to technological tyranny. You may not need that upgrade, that new electronic gadget — unless it truly contributes to making life easier.

5. Join a committee to clean up information fallout around your office. Talk about writing shorter, more precise memos and reports. Rediscover how to have brief phone communication. Make data visual; it's easier to understand and compare, and is far more entertaining to the brain.

6. Remember the great mother of Invention: Necessity. Invent a solution for yourself and if it works, share it.

HOW MUCH CAN YOU SAVE AT A NICKEL A NUMBER?

IN GOD WE TRUST
LIBERTY
1988

PLENTY.

If you buy random digit samples, our standard price of a nickel a number can really add up to big savings. Like 37% to 68% over your current sampling supplier. The best part is there's no sacrifice of quality or service. Ask around. We even remember little niceties. Like a 100% guarantee. Professional advice. 24 hour service. An aggressive discount policy. Free record coding and sampling reports. No contracts to sign.
Call STS now at 1-800-944-4-STS.

STS
SCIENTIFIC
TELEPHONE
SAMPLES

TARGETED • RELIABLE • FAST

THE
OTHER,
BETTER VALUE
SAMPLING
COMPANY IN
CONNECTICUT

since
1991

Exact Age
Income
Gender
New Mothers
Elderly
Children
Low Incidence
Ethnic
Business
RDD
Many Others

PENNIES PER NUMBER ¢

Call for quotes or free brochure.

AFFORDABLE
SAMPLES, INC. TM

Old Greenwich, CT 06870
800-784-8016 • FAX 203-637-8569
e-mail 72672.1327@compuserve.com

Survey Monitor

continued from p. 8

CME Kid Ad-Traction Study released in March 1998. However, when respondents were asked how much — a little, a lot, or not at all — they wanted the products featured in their favorite commercials, disparities emerged. The highest rating for "want it a lot" was only one in four children (25 percent) for Denny's, despite the restaurant's top 10 commercial appeal. For the two beer brands (Budweiser and Miller Lite), kids overwhelmingly (82 percent) did not want the product at all. "From these results, it's obvious likability does not, by itself, automatically equal desire," Fruechte says.

Humor, music and story line remain the most essential elements to likability as identified in last year's study. Salon Selectives, an adult hair care product line, had few wanting the product, yet was cited as popular mainly because of the memorability of its musical theme, "Who's That Lady?" "The purpose of advertising is to develop brand preference among consumers," says Fruechte. "Entertainment is essential for effective marketing to kids, but used alone it can overshadow meaningful product messages. Combining entertainment with a demonstration of product benefit is the ideal, especially for kids."

An example is the Taco Bell campaign, featuring the talking Chihuahua. In addition to being a Top 10 commercial favorite, 83 percent of the children surveyed said the commercials motivated them to want the Taco Bell products advertised. Many respondents cited the food particularly and could recall if the product featured was a taco pizza or nachos — reflecting a successful application of relevancy. Yet Taco Bell's seeming success is not universal — the study underscores the nuances within a kids audience. Among boys, ages 15-17, Taco Bell ranked in their top 10 most disliked commercials, with nearly half saying "they see the commercial too often," indicating the vulnerability of messages to wear-out due to overexposure.

"More than adults, the marketing landscape for kids is incredibly complex," says Fruechte. "Gender and peer pressure are factors, as is the media spending a campaign receives. Focusing on a clearly defined target is as critical to success as is the need for an entertaining and relevant product message." For more information call Dennis Smith at 612-347-1328.

Make your Web site a site to see

To find out how consumers discover Web sites and what drives them to return after their initial visit, Cambridge, Mass.-based Forrester Research surveyed 8,600 households and compiled the responses in its 1998 Consumers & Technographics Media Field Study. Forrester asked on-line consumers to select the sources they use most frequently to acquire Web addresses. Results were not surprising: Internet resources win. Fifty-seven percent of those on-line use search engines to find Web sites. Across all Technographics segments, this is the most popular way to receive Web addresses. E-mail messages and links from other Web sites are also frequently used as sources for URLs.

Twenty-eight percent of consumers said that they find out about Web sites by word-of-mouth. Career-motivated consumers put more weight on suggestions from acquaintances than those who are entertainment- or family-motivated.

Magazines are the best traditional media. Magazine ads are used just slightly less than word-of-mouth and far more than other traditional media ads. TV commercials, though used infrequently, are more effective than newspaper ads or radio commercials.

Banner ads are a dead end. Only 7 percent of consumers said they used banner ads to find URLs. More than half of on-line consumers have never clicked on a banner advertisement. Of those that have, 69 percent do not remember the last banner ad they clicked on.

Forrester explored the reasons why consumers return to Web sites, and found that experiences rather than trusted brand names drive consumers back to sites. Content is No. 1: it drives 75 percent of consumers to return to their favorite Web sites. Content quality is especially valued among career-motivated consumers.

Site design is No. 2. Consumers gravitate back to sites that have an intuitive interface and download quickly. Speed and cutting-edge technology are particularly valued among entertainment-motivated consumers.

Consumers want current content. All on-line users, particularly career- and entertainment-motivated consumers, return to Web sites that are updated frequently.

Promotions, chat, and games fail to drive repeat traffic. Few consumers go back to Web sites for promotions like coupons and incentives. Furthermore, chat and on-line games are not compelling enough content to cause the majority of users to repeatedly visit a site.

Brand is a losing battle. Few consumers revisit Web sites due to brand. This holds true across all Technographics segments — with the exception of Media Junkies, who are slightly more brand-conscious than the other segments.

Web site designers and marketers should adopt these tactics:

• Web sites need to be sticky. Sites must build content that provides utility to the user. Providers must ask themselves questions such as these: What problem can I help users solve? What task can I make easier? What new product will improve a user's on-line experience? In addition, a site must update content frequently and focus design efforts on ease of use and speed. Search engines are critical. Take the time to ensure that your site comes up as a choice when potential visitors use a search engine.

Come visit our newest facility in the heart of

NEW YORK CITY

spacious and comfortable conference rooms • bi-level viewing rooms with writing desks • quality respondent recruiting • state-of-the-art audio/video equipment and on-site staff • private reception areas • private client lounges with fax, modem and climate control • modern, fully equipped kitchen • gourmet catering

Schlesinger Associates

A Marketing Research Corporation

500 Fifth Avenue • Suite 1030
New York, NY 10110 • Phone (212) 730-6400
Fax (212) 730-0853 • SANYC@aol.com

New York • New Jersey • Orlando • Los Angeles

MEMBER
FocusVision Network

- Drive customers to invest time in your site. Users prefer to customize sites for themselves rather than have custom content pushed to them. Sites that can draw customers to set up content that they value, such as custom portals like My Yahoo!, will create loyalty with their customers. Many types of information are suitable for self-directed customization, such as stock quotes and analysis, e-mail news services, detailed regional weather information, and television and movie schedules.
- Be prepared for multiple access points. Consumers are beginning to use a variety of wired devices, from PCs and PDAs to digital cell phones, to access information. For the sake of simplicity, users will look to use the same providers across devices. Sites must be prepared to connect with their users, regardless of how many ways they choose to contact them.

For more information visit the company's Web site at www.forrester.com.

Sales of school uniforms are soaring

A survey by The NPD Group, Inc., Port Washington, N.Y., shows school uniform sales reaching $900 million at retail during 1998. According to NPD's School Uniform Report, about 7 percent of all dollars spent on children's apparel last year went toward school uniforms. During the month of August, 11 percent of all childrenswear dollars were spent on school uniforms. "School uniforms are a significant trend impacting the childrenswear industry," says NPD director Lucy Effron. "The trend is expected to continue, with more major metropolitan school districts, such as New York, instituting policies this year."

According to NPD, just over a third of school uniform dollars are spent in discount stores. Chain stores have the second largest market share at 25 percent. Specialty stores have 20 percent of total sales, and department stores have 7 percent. Cost is the key driver in determining where school uniforms are purchased, cited by more than half of survey respondents as their most important deciding factor. Convenience is the second most important purchase driver, followed by school requirements and store reputation.

School uniform items are less likely to be purchased on sale than other childrenswear items, NPD reports. However, households where children wear uniforms generally spend less on children's school clothes. Those who purchased school uniforms spent an average of $104 on school clothing during the first three quarters of last year, while those who did not purchase school uniforms spent an average of $185. New York and Los Angeles are the top two markets for both school uniforms and total childrenswear. However, many other top childrenswear markets are not yet top markets for school uniforms. As more and more cities jump on the uniform bandwagon, major markets may shift, creating new challenges for those now in or looking to enter the business.

Top 10 Markets for School Uniforms

New York
Los Angeles
Sacramento, CA
Chicago
Seattle/Tacoma
Houston
Washington, DC
Pittsburgh
Wichita, KS
Baltimore

Top 10 Markets for All Childrenswear

New York
Los Angeles
Chicago
Philadelphia
Boston
Washington, DC
Detroit
Atlanta
San Francisco
Cleveland

"For retailers and manufacturers who don't want to lose out on this growing portion of the childrenswear

"We even speak English!"

From our south Florida CATI center, we offer multilingual data collection in the U.S., South America, Europe and Asia.

Spanish and Brazilian of course, as well as other mainstream European and Asian languages. For those really obscure projects, we can handle everything from Vietnamese to Farsi.

And just in case Mrs. Jones in Chicago is a bit rusty on her Hindi, we even speak English!

DMSG: Added Value At No Additional Cost

- domestic and international calling center with a multilingual staff
- large, complex studies including multiwave trackers
- quarterly omnibus
- state of the art automatic and predictive dialing technology
- B2B, industrial, and high tech as well as consumer
- management with over 50 years research experience

DMSG: Add Value, Not Cost

DMSG: Direct Marketing Services Group, Inc.
7601 North Federal Highway, Suite 200B
Boca Raton, FL 33487
Tel: 561-997-2324 • Fax: 561-997-5844 • Email: dmsg@safari.net

business, it will be necessary to emphasize how they've made their offerings and stores more convenient," says Effron. "Local or regional managers will need to develop connections with school districts and be completely familiar with where their schools stand on dress codes. The school uniform business is different from the rest of the childrenswear business, and only those who take the right approach will make the grade."

NPD's School Uniform Report is based on purchase data from NPD's nationally representative American Shoppers Panel of 16,000 households and information collected from a special analysis of over 350 households who purchase school uniforms. In addition to profiling the typical school uniform wardrobe, the report addresses pricing, distribution channels and how uniforms affect other childrenswear purchasing in these households. The study focuses on apparel for ages 4 to 13. For more information call Lucy Effron at 516-625-4289 or e-mail her at lucy_effron@npd.com, or visit the company's Web site at www.npd.com.

Increased age, increased spending

American men between the ages of 50 and 54 have the greatest spending power and the highest average annual salary, according to a MetLife Mature Market Institute analysis and the MetLife Statistical Bulletin. MetLife is a New York financial services firm.

These older Boomers and pre-Boomers, born between 1944 and 1948, choose to spend a smaller percentage of their incomes, and save more than younger Boomers. A greater part of their spending is discretionary in nature. They spend less on necessities such as food, shelter, apparel and other household related outlays for operations, supplies and furnishings. In addition to saving a higher percentage of their incomes, they have more discretionary income available for such items as education, food consumed away from home,

THIS IS NOT THE WAY TO MANAGE CUSTOMER SATISFACTION

At Burke CSA we work with you to develop measurement and management processes that "close the loop" with your customers to create long-term customer value, loyalty and improved business performance. We help you target priorities for improvement and develop action plans to address them. The result is a process of focused, on-going improvement based on your customers' voices and your company's actions.

1-800-264-9970

Burke

BURKE CUSTOMER SATISFACTION ASSOCIATES

WORLD WIDE WEB SITE: www.burke.com

travel, cash contributions and in all likelihood, place a greater emphasis on the quality of the goods and services they purchase.

Men in the 50-54 age group currently earn an average of $52,738 per year, a full 25 percent more than all men working full-time. Women currently reach their earning peak at age 45-49. But, as Boomer women with longer work histories move into the 50s age group, the pattern for peak earnings may change and more closely resemble that for men.

"These figures should be especially significant to businesses and marketers as they look to the future, since the 50-54 age group not only has the highest discretionary income but also is one of the nation's fastest growing demographics," says Sandra Timmermann, director of the MetLife Mature Market Institute.

"Over the next 15 years, businesses that have the foresight will redesign products and services and adapt their marketing strategies to Americans in their early 50s. Those who do not will miss a window of opportunity," Timmermann says. "As the Statistical Bulletin states, by the year 2010, those aged 50 to 54 will increase by eight million people, with individuals in their 50s totaling 30.5 million in the year 2000 and 42.8 million by 2015, amounting to 13.8 percent of the population. That is an extraordinary amount of collective buying power."

Businesses should also take note of the increasing ethnic diversity of the 50+ population. The percentage of white non-Hispanics in their 50s will drop to 72.5 percent of the population in 2015, from 79.7 percent in 1995. This compares with an increase of 1.8 percent for Blacks to 12 percent of the population, a 4.2 percent increase for Hispanics to 11.2 percent of the population and a 1.5 percent increase for Asians to 4.6 percent of the population, also between 1995 and 2015.

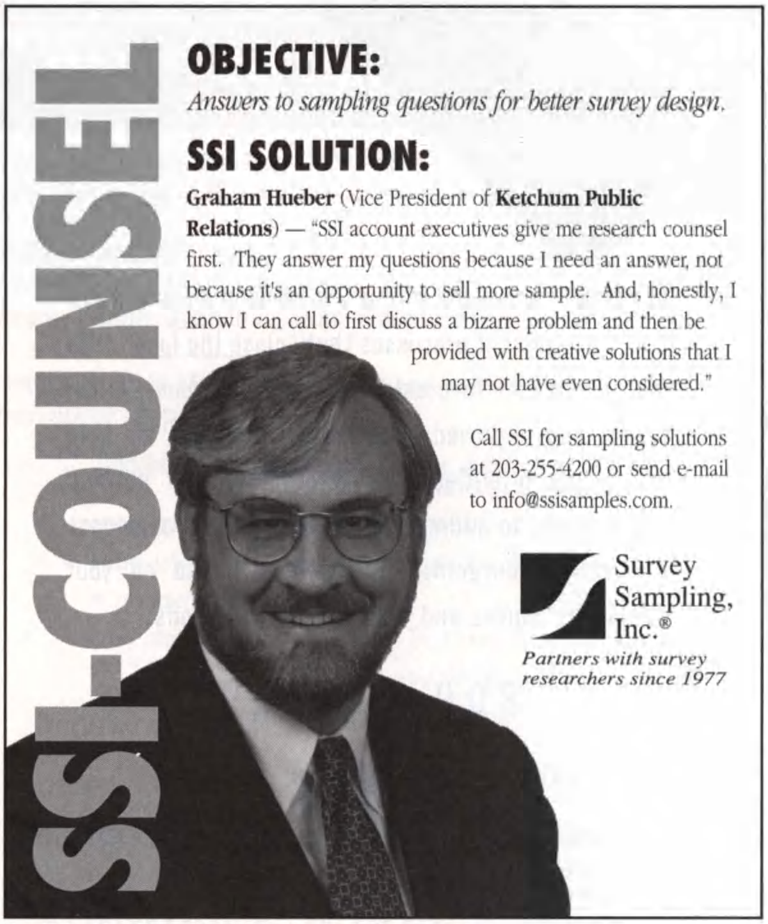
While those in their early 50s have and will have relatively high incomes, most will not retire until they are forced to do so. According to the MetLife Statistical Bulletin, early retirement will result in a reduction in pension benefits, which will be too great for the average individual to absorb. The Bureau of Labor Statistics indicates that, on average, an individual retiring at age 55 in 1993 with 30 years of service under a defined benefit plan and with final annual earnings of $45,000 would only be able to replace 21.5 percent of his or her pre-retirement income. By contrast, the same person retiring at age 65 with 40 years of service would be able to replace 35.6 percent. In addition, the sooner one retires, the more chance that inflation will erode purchasing power.

"With an uncertain future for Social Security, escalating health care costs and inflation, along with the desire for people in their 50s to remain productive, it comes as no surprise that the majority of Baby Boomers will not retire before age 65 and some will retire even later," says Timmermann. "This will also mean that people in their early 50s will understand the importance of saving more, which will have an impact on the financial services community."

The analysis found:

- Between 1995 and 2010, the number of individuals aged 50 to 54 will increase by more than eight million.
- In 1996 about four-fifths of the civilian non-institutional population 50-54 was active in the workforce.
- The average earnings for men aged 50-54 in 1996 was $52,738, some 25 percent above the average level of earnings for all full-time working men.
- The mean earnings for women aged 50-54 is $29,407, 3.7 percent above the average for all working women, but by ages 55-59 they fall to $27,937, 1.5 percent below the average for all women workers.
- On average, men reach their earnings peak in the first half of their 50s, whereas women reach their earnings peak between ages 45 and 49.

For more information visit the company's Web site at www.metlife.com.



OBJECTIVE:

Answers to sampling questions for better survey design.

SSI SOLUTION:

Graham Hueber (Vice President of **Ketchum Public Relations**) — "SSI account executives give me research counsel first. They answer my questions because I need an answer, not because it's an opportunity to sell more sample. And, honestly, I know I can call to first discuss a bizarre problem and then be provided with creative solutions that I may not have even considered."

Call SSI for sampling solutions at 203-255-4200 or send e-mail to info@ssisamples.com.

Survey Sampling, Inc.®

Partners with survey researchers since 1977

Advertorial

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

Sorensen Associates inc
25 years of in-store research

Portland, Oregon Headquarters
800-542-4321

Minneapolis Client Service Office
888-616-0123

See us on the web - http://www.sorensen-associates.com

Product & Service Update

continued from p. 11

data/video projection systems, has introduced the In Focus LPTM1200, a 1200-lumen, native XGA (1024 x 768) projector for the conference room. The InFocus LP1200 delivers features such as picture-in-picture display, digital zoom, electronic keystone correction, and built-in PC card slots and four inputs (two computer, two video).

Dual source display provides instant-on, picture-in-picture capabilities. This feature gives presenters the option to view a second spreadsheet on top of the first, add a video clip to play alongside displayed data or switch between two simultaneous presentations at once. With the touch of a button, drawings, schematics or spreadsheets can be shared. The LP1200 offers electronic zoom and electronic focus, allowing the versatility to present from anywhere in the room. Featuring a color palette of 16.7 million colors, the native XGA-resolution, 20-pound LP1200 handles high-resolution business graphics, while 250:1 contrast and polysilicon LCDs ensure saturated colors and crisp detail in graphics, spreadsheets, video and data. For more information call 800-294-6400 or visit the company's Web site at www.infocus.com.

A RESEARCH FACILITY APPEALING TO BOTH SIDES OF THE MIND.
It'll make you think.
Wow!
Twice.

#1 Facility in Texas, Top 10 in North America, '97 and '98 Impulse Directory survey of moderators

Premier Houston Galleria location

Moderator-designed and operated

3 spacious, contemporary focus group suites with private lounges

Numerous sophisticated amenities and high-tech features

OpinionLab™ – central location testing using multi-media PCs

FocusVision ™ videoconferencing

75 CATI stations for expert recruiting and national interviewing

Outstanding Amarillo facility for a different Texas perspective

Brought to you by Anndel and Andy Martin

FocusVision Network, Inc.

OPINIONS UNLIMITED
A PREMIER RESEARCH CENTER

FOCUS GROUP SUITES
TELEPHONE INTERVIEWING

Three Riverway Suite 250
Houston, TX 77056
713-888-0202

Reports profile French Internet use

Motivaction International, a Viroflay, France-based research firm, is now offering reports on the use of the Internet in France. One report, "Evolution of the Internet in France 1997/1998," provides a general picture of the Internet in France and in the other French-speaking countries (Canada, Belgium, Switzerland), looking at topics such as Web popularity, household multimedia equipment, and profiles of Web surfers. For more information call Alain Dinis at 33-1-39-24-53-18 or e-mail to adinis@motivaction.fr.

Web site offers e-commerce articles

The Electronic Commerce Research Room (www.wilsonweb.com/research/) is offering free access to articles on on-line selling and store development. Dr. Ralph Wilson is the virtual librarian to the Research Room's 1,500 articles on how-to build successful on-line stores, accept credit cards on-line, learn from industry case studies on Internet sales and more. The stacks at Wilson's Electronic Commerce Research Room organize the discipline of on-line selling into 43 categories. A short list of categories includes store design and internal marketing, cost-cutting measures, demographics and shopping behaviors, fulfillment issues, transaction systems, and shopping software technologies.

Although a number of articles are available to read for free, full access to the Electronic Commerce Research Room is included with a subscription to Wilson's e-mail newsletter *Web Commerce Today*. For more information visit the company's Web site or call 916-652-4659.

Data Use

continued from p. 19

ite's browser is strictly a Windows program, its main "publisher" runs from the MS-DOS prompt, using the old command-line format, complete with "switches" and required syntax. That is, when you start the publisher, you are staring at an empty DOS window waiting for you to enter commands. Many of you may have forgotten, blissfully, that such a thing exists — while others of you may even be young enough never to have seen one. Now, I know many macho programmers will find it very manly (or "existentially authentic") to type in complex commands. Your reviewer, however, could live very comfortably without ever worrying again whether the correct command is "itepub a:tables –r (5:125-132)&(6)&(8)" or some variant with square brackets, and/or dollar signs, and/or alternate spacing — or something else entirely.

Certainly, you can learn the syntax, but expect to thrash around a few times before you create your first successful document. My question to the folks at ISPC is a simple one: With all the power of Windows to create menus, buttons, selectors, etc., why ask users to go through this?

A more up-to-date program interface not only would be welcome, but would allow users to hit the ground running. Nobody likes to stumble on their first meeting with new software, and it seems many users would with ite. Its current command line-based structure can always be left as an option, but it seems to limit the program's acceptability to new users if it is the only choice.

Finally, the loudest complaint goes toward the "dongle." This is an awful device that must sit directly on the parallel port of your computer for the program to run. In olden times, dongles appeared on a few other programs, but users rightfully hated them, and so they mostly have disappeared. These little monsters present several problems. If you have more than one program with a dongle, you most likely will have constant trouble, since each dongle typically wants to be first in line at the parallel port. You would need to be back behind the computer continually replacing these beasties so they did not conflict with each other.

Also, dongles can cause printer and scanner timing problems. Many newer printers and scanners (that still use the parallel port) need to communicate in both directions with the computer. Dongles can disrupt the timing of communications, or stop them entirely, thereby rendering your printer and/or scanner useless. Finally, there is the space problem. Dongles protrude from the back of the computer, which can (for instance) cause the computer not to fit onto a shelf or into some other space any longer.

The people at ISPC say that if you hate the dongle even half as much as I do, they will give you a copy of the program that does not require one. Since dongles, like all security devices, can be defeated (and there is plenty of free software on the Internet that does precisely this), they serve mainly as a punishment to honest users. In your reviewer's opinion, it is time for ISPC to abandon these awful and outdated little devices.

If ISPC feels it is mandatory to have security to protect themselves from market researchers who would otherwise abuse their software licenses, then they should put "drop-dead dates" into their programs (as SAS does). This is simply a small piece of code that prevents the program from running once its license period is finished. A drop-dead date can be defeated fairly easily, but if users are determined to cheat, then they will find a way to cheat the dongle as well.

A quick overview of ite

This program serves a truly worthy function, as it creates electronic reports that go well beyond traditional paper-based crosstabulations. In fact, ite shows us the next step in what traditional crosstabulations can become. It can do remarkable things, such as indexing your tables and creating a table of contents for them. Also, it can put the same electronic documents on disks or on the Web. It has many other capabilities that make it highly worthwhile, functionally. Once you learn how to use this program, you should find the results really pleasing.

Still, this program needs some work. To create the

The Analytical Group Inc.
Solutions For Your Software & Service Needs

Software:
WinCross™
NEW! CATI RELEASE WinQuery™
Services:
Telephone Interviewing Centers
Questionnaire Programming •Coding
•Scanning & Data Entry •Data Processing •Statistical Analysis & Consulting •Database Management
1-800-946-2767
http://www.acsinfo.com
Chicago • Scottsdale • Boston

reports, you must contend with a command-line-based DOS box, and so must learn, or relearn, the art of typing in commands with fairly complex "switches" and syntax. In the Windows environment, this looks and feels like an anachronism, especially as the browser that comes with the program takes full advantage of the power that Windows can offer. In short, you must have some patience to get the full strength of the program working for you. Then, finally, there is the dongle. If you buy the program, insist on having a version that does not require one to run.

ISPC has the basic ingredients of a really fine program here. They have some ambitious plans for the future, such as adding statistical testing where possible to tables that do not have this — which would certainly be a major breakthrough in making output more useable. This is one program that encourages very high hopes, and deserves careful attention. If ISPC can just remove some small rough edges, ite could become an essential for market researchers and all others who need to distribute crosstabulated data.

One last surprise

As a postscript, ISPC had a chance to read this review before publication and, amazingly enough, have pledged themselves to make product improvements in response to two of the suggestions made here. Specifically, they will set to work immediately on giving users the choice of using a full Windows interface in all parts of the program. Even better, they promise to eliminate the need for the dongle.

What can we say about this? Perhaps a good start is: "Thank you for listening and responding." These skills are rare anywhere — and are particularly so among software companies. We are truly impressed.

You can reach ISPC at their toll-free number 888-833-4243. (Remember there's a five-hour time difference between their London headquarters and Eastern Standard Time.) You can also visit their Web site at www.efiche.com or send them e-mail at info@efiche.com.

Windows
2000?

On to Microsoft

Here we bring you to the focal point of Windows software development: none other than Microsoft. We'll be looking at their major products of today, and trying to gaze ahead to Windows 2000 and Office 2000, which may be closer than you think — or want.

Apparently when you ask Microsoft its own question, ("Where do you want to go today?"), the answer is "everywhere." Microsoft continues its push to get smaller versions of Windows into everything with more processing power than a toaster. (Don't laugh now, because I'm sure that by 2002, only appliances like vacuum cleaners will still come with standard Pentium, or 586, processors.)

On the other side, Microsoft is developing furiously an integrated Windows product line that will work both on regular desktop PCs and on huge, centralized servers. Microsoft understands as well as anybody the great vulnerability inherent in the PC-centered model of computing that they now dominate. Having been among the vanguard that caught IBM sleeping at the dawn of the PC, they do not want to be overtaken now.

Conctivity a key

Looking at Windows 98, we also can see the great importance Microsoft places on connections between the PC and the outside world. For one thing, everything in Windows 98 looks like a Windows Explorer window. This includes (for instance) the Control Panel that lets you fiddle with the settings on your PC. For those of you who somehow missed Windows 95, the Explorer is the Windows file manager, and also looks a lot like the Microsoft Internet Explorer Web browser. This way, no

BUSINESS TO BUSINESS
DATA COLLECTION

- Meticulous Project Management
- Accurate Reporting
- Highly Trained Interviewers
- Excellent Gatekeeper Techniques
- Convenient Remote Monitoring
- 100+ CATI Stations

Directions In Research, Inc.
8593 Aero Drive
San Diego, CA 92123
(800) 676-5883
Fax: (619) 299-5888
info@DIResearch.com
http://www.diresearch.com
8593
DIR
DIRECTIONS IN RESEARCH

matter where you go or what you do with your PC, it looks like you have never left home.

In any event, we can see that Microsoft envisions connectivity as the next big change in computing. They apparently are planning for the day, in the not-too-distant future, when you will have a nearly seamless integration of content residing in your PC, on the Internet, and on any other computing device in the world.

Solutions allowing greater connectivity may be closer than you think. The big thinkers on the subject of course disagree on the nature of the problems to be solved, but many simplify them into two major components. One is the so-called data backbone, or overall capacity of the world to handle the increasing flood of messages that will inevitably follow once we all get connected. In the U.S., at least, this problem has just about been solved. For instance, Qwest, a company that you most likely have never heard of, is just now finishing a backbone across the U.S. that will have roughly 20 times the bandwidth (or capacity) of AT&T, MCI, Sprint and WorldCom combined. Similarly, Motorola has just launched an unprecedented private network of 66 low-altitude satellites for data communications.

These are just the beginnings. These massive build-ups, together with the "packet switching" technology that made the Internet possible — and that allows many communications to share one data line — will give us ample capacity to fill our entire existences with computer messages.

The main barrier is the so-called "last mile" problem. This involves getting the data over the relatively short distance from the local switching station, over the standard copper telephone wires, and to you, the user.

You likely will not be surprised to find that Microsoft expects to do this for you as well. At least, a consortium proposing a new communications technology exists, consisting of none other than Microsoft, Intel, and whatever remains of the Bell companies after they finish devouring each other. This group has devised a new method of data transmission called variously ADSL, DSL, or G-Lite (and probably many other official names).

DSL (or ADSL, or G-Lite) works over existing phone lines, and promises to deliver data at something between 340Kb and 1,500Kb per second, as opposed to the 56.6Kb possible with a new modem. This technology definitely works, and it even has appeared in a few select markets.

You can find a wide variety of other contenders squaring off against the "Microsoft-Intel-Bell" group. (Incidentally, that's one name you definitely can say has a "ring" to it.) (*Ouch!* — Ed.) Primary among these competitors is AT&T, which just bought cable-TV giant TCI, and which is working furiously to convert their entire cable network to digital signals. This ultimately will give AT&T access to about 40 percent of U.S. households, via the technology it is backing, the cable modem.

The cable modem promises an unlimited open line to the Internet, just as the cable box on the TV provides open

Do you know 2.5 Million cooperative people who can satisfy your research needs?

We do! Our **Harris Interactive** online cooperative respondent panel of over 2.5 million people is the most efficient way to get the information you need fast!

Let the power of Internet research improve your business.

For more information contact:
Robert C. Kallstrand, Executive Vice President
e-mail: bobk@gsbc.com
Phone: (800) 866-7655
Fax: (716) 272-8680

Gordon S. Black Corporation Rochester, New York
A Harris Black International Company

access to cable TV. (This may seem unusually dull, but we should point out that you do not need to dial the cable provider every time you turn on your television—and that the Internet just is not the same yet.)

Cable modems look really promising, with the only unknown being actual transmission speeds once the lines get heavy use. Apparently, heavy Internet traffic will do little, if anything, to slow down ADSL, but cable modems can be expected to suffer from slower performance as the lines get busier. At least, that's the story for today.

Other, even more unusual technologies are being announced every few months, or even weeks, and upgrades to both cable modems and ADSL seem likely. At least, both sides have sent out press releases promising still-better technology. As anybody who has dealt with the industry knows, with software, an announcement of a product as practically the same as having the actual product.

This battle should be quite interesting to watch. It seems entirely unclear which of today's big competitors, if any — in the name of connectivity — finally will claim the right to vacuum all the spare change out of our pockets.

About Windows 98

If you are now running Windows 95, you may well ask if you need the upgrade. The answer is a definitive "yes." While Windows 95 does most things that Windows 98 does, remember that its newer sibling reflects three more years of development. Also, and as importantly, Windows 98 reflects three more years of updates, patches, and plain bug fixes.

In addition, Windows 98 adds a highly useful feature, the 32-bit file allocation table (or "FAT 32," as the software industry has so charmingly called it). This not only works better and faster than the old 16-bit file table (or FAT 16, as you might expect), but it actually gives you back disk space. Expect the new allocation system to give you back some 30 percent or 40 percent of hard drive space that you have lost due inefficiencies in the old system.

Beside all this, Windows now can run all sorts of disk maintenance activities efficiently at night, when you are not (or at least should not be) working. Under Windows 95, the scheduler for these activities never seemed to work quite right, at least for your reviewer. Windows 98 has made vast improvements in running computer maintenance without your active assistance.

Now, you can simply leave the PC alone and it will do the cleanup while you rest. It will defragment (or clean up) the hard drive and test for, and repair, any defects in the surface. Microsoft's new task scheduler also runs software from other manufacturers, like Norton's anti-virus sweep. Windows 98 even does a good job switching off the PC's monitor if the monitor is new enough. In short, you can finish your work, walk away, and never need to turn off your PC if you so choose. (People still argue about the merits of "powering down," but it seems to work just fine to leave the PC on to do the dirty work at night. As long as

How To Find The Best Deal On WATS Interviewing.

The high costs of telephone interviewing getting you down? I/H/R Research Group can help — with the highest quality, lowest prices, and best service available anywhere.

- *100 line national coverage*
- *75 Ci3/CATI stations*
- *On time results*
- *Certified interviewers*
- *Highest quality*
- *Low prices*
- *Project bids in one hour*
- *On/off premise monitoring*
- *State-of-the-art technology*

What makes I/H/R the best? Some say it's our on-going training program or our great supervisors... But, what seems to make our clients even happier are the really competitive prices. We're growing, so we can afford to bid very aggressively.

If you're tired of the same old song and dance, give I/H/R Research Group a call. We'll make sure your job's done right and at a cost you can live with.

I/H/R Research Group

Quality Marketing Research That Works.

4440 S. Maryland Pkwy. - Suite 203 - Las Vegas, NV 89119 - (702) 734-0757

the monitor goes off, the PC does not draw much power, either.)

A major Windows 98 warning

You need only exercise one precaution before installing Windows 98, but this is an important one. Namely, **if you have any anti-virus software running, you must completely disable it, if not uninstall it, before starting to set up Windows 98.**

If you do not completely disable the anti-virus software, it may well "wake up" as you install Windows 98 and then block the rest of the installation. This happened on one of your reviewer's machines, and it was not pretty. Microsoft could not offer any good solution to this problem, nor even a reasonable "work-around." Ultimately, fixing the resulting mess required eradicating the Windows registry. The registry is an enormous, unfathomable area that keeps track of all your hardware and software so that Windows can find them. Its destruction, then, meant reinstalling every piece of hardware and software on the PC. Not fun.

Now the good news

Aside from the one installation problem with anti-virus software that Microsoft should have warned about and did not, Windows 98 has behaved quite well. It has added several useful features to its Explorer file manager — or at least got the old ones to work correctly — and seems to operate a little more smoothly than Windows 95. It has more flexibility, and lets you have more control over what appears on the desktop (which still looks like the background of the screen to me).

Windows 98 gives you more and better information about your system, and does a better job than Windows 95 in resolving conflicts in the computer's hardware. (These can happen, for instance, when two or more added devices — like scanners, fancy sound cards, modems, digital cameras, etc. — demand to use the same "IRQ" or address space in memory.) In fact, Windows 98 sailed past a problem that continuously eluded Windows 95, involving the modem and sound card that came installed with my PC (no brand given to protect the innocent from legal action). Oddly enough, Windows 98 gave me a message saying that I would need to fix the conflict "manually," but then took care of it anyhow.

Windows 98 also comes with a nice surprise added to it, namely, what appears to be the entire Windows 98 Resource Kit. In book form, this runs about of 1700 pages, and officially is priced at $70. It includes everything you ever wanted to know about Windows 98, and more, and is loaded with extra little utilities and other add-ons that may be just what you want.

Windows: still sticking in a few places

Unfortunately, this new Windows has not entirely eliminated problems inherent in its predecessor. Windows still

Welcome to the Comfort Zone.

Focus Pointe, where peace of mind is part of the package.

With the Comforts of Quality, Trust and Reliability, Focus Pointe is raising the standards for focus group facilities.

- Established track record for quality and service.
- Skilled professionals with a reputation for accuracy and integrity.
- In-house recruiting and state-of-the-art telephone screening.
- Access to databases for every type of demographic or industry segment.
- Full-service facilities designed with you and your clients in mind.

For the Comforts you deserve, Call 1-800-220-5088

FOCUS POINTE

18 Tremont St., 11th Floor • Boston, MA 02108
100 N. 17th St., 3rd Floor • Philadelphia, PA 19103
225 City Ave., Suite 10 • Bala Cynwyd, PA 19004

relies on three definitely restricted memory areas (or heaps) called respectively, "User," "System," and "GDI." These areas remain the same size, no matter how much memory you add to your machine. As you run more programs, these areas get more taxed.

Most unfortunately, many programs seem to leave "garbage" in these areas after they close. This means that the memory available to use in these areas slowly gets depleted as Windows runs. When memory gets too low, Windows stops running. The only way to replenish these areas is to restart Windows.

Whether Windows 2000 resolves these problems remains to be seen. This is an open request to Microsoft, then. We all understand that Windows is so complicated that no group of 10 people can understand it all. However, we honestly believe that you can solve the problem of taking out programs' garbage — if you set your collective minds to it. Show us that there indeed is a Santa Claus, and put an end to this problem. Thank you.

Help with — but not a solution to — the memory problem

Windows at least includes a nice little utility in its "system tools" called the resource meter, which doesn't solve the memory problem, but can warn you of upcoming trouble. You can set this to turn itself on at start-up time, and then it will give you ample advance warning about when the system is starting to run low.

You need to do this in several steps, so take a few deep breaths and then try to follow us on this expedition. First, you go to "Settings" in the "Start" menu, and choose "Task Bar and Start Menu." You then choose the "Start Menu Programs" tab, and click the "Advanced" option button (although one of the other choices probably would work also). You will then see a display of all the programs listed in the "Start" menu. So far, this is not too bad, right?

Now you will need to find the resource meter's icon — it's buried well down, beneath two submenus. Click on "Programs," then go to "Accessories." Once there, go down another level to "System Tools." The icon for the resource meter should be there, unless you somehow missed installing this when you set up Windows 98. If the icon is indeed there, then you can drag it to the group called "Startup."

If the resource meter icon is not there, you may need to rerun the installation program for Windows 98, and specifically request that this be added. This may seem like a nuisance — and to an extent it is. The new Windows, though, does not insist on reinstalling many parts of itself just to insert a feature or two, and this makes adding things you omitted relatively painless.

Once you have the resource meter, it gives you a quick visual reading on the state of the three critical "heaps." The meter changes from all green when everything is fine, to yellow when Windows is getting fatigued — and then to

GROUP DYNAMICS

WHICH LOCATION IS IDEAL FOR YOUR NEXT QUALITATIVE PROJECT?

BALA CYNWYD, PA

Brand New Facility
(Same Location)

- "City" Consumers
- Expertise in Medical/Health Care Recruiting
- All Purpose Room With Observation
- 4 Focus Group Rooms/Client Suites providing privacy and comfort
- Founded In 1981

VOORHEES, NJ

- "Suburban" Consumers
- On-Site Phone Room Recruiting
- Commercial Test Kitchen
- 2 Multi Level Observation Rooms Seating 25 In Comfort
- 20 Minutes To Downtown Philadelphia
- Designed By Qualitative Consultants (Opened 1992)

INTERACTIVE VIDEOCONFERENCING
"WORLDWIDE"
GroupNet™

BOTH FACILITIES:

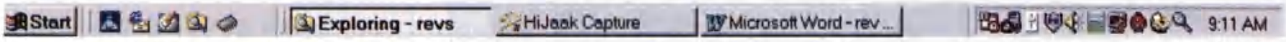
OWNER/OPERATED FOR PERSONAL SERVICE • 35 MINUTES FROM PHILADELPHIA AIRPORT • FREE PARKING

CALL (800) 220-1011 FOR BROCHURES AND INFORMATION

red when "resources" are dangerously low. (This means it's definitely time to restart.) Even without the meter running, Windows will send a message to you when it is terribly low. By then, though, it is sometimes too late to save your work from the impending crash.

More about the resource meter and the "trays"

The resource meter sits in a special area of the screen called "the tray." This actually should be called the "right tray," since you now have a left tray (which doubtless has some other official name) that includes programs you can run immediately. The figure shows you the "task bar" gracing the bottom of the screen on one PC (we'll let you guess whose) with its tray areas.



A look at the task bar illustrates the many things Windows 98 can do at once. Most of the items in the right tray are running, or dormant, in the background. At the left edge of this tray, we find Norton's (as in Norton Anti-Virus) and Microsoft's task schedulers. (Norton's scheduler could probably go away, but it ain't bothering anything, so I'm not bothering it). After these two, we have the audio controls, Norton Crash Guard (which often resuscitates programs just as they are about to fail), the speaker volume control, and our new friend, the resource meter.

Following all these, we have another neat Windows utility called Quickres. This is another nice feature that may or may not come installed, but it is definitely there on the Windows 98 CD-ROM, waiting for you to find it. Quickres lets you change the resolution and number of colors displayed on your monitor, on the fly, without needing to restart Windows. (This control is good to have if, for instance, you want to work with nearly infinite colors in a graphics program, but also at times need to use older programs that cannot exceed 256 colors.) Without Quickres, any change in screen resolution or in the number of colors displayed requires you to restart Windows, so this is a fine addition to consider.

To the right of this, we have a nice freeware utility called "KillTimer," which AOL users will love. It works only with AOL, and disrupts some of its most obnoxious behaviors. This utility dispatches all those stupid AOL messages asking if you are done yet, and also prevents AOL from logging you off involuntarily. (You can find this with many other free or low-cost software goodies on a Web site called "No Nags." I get to this site at this address: www.noguska.net/nonags/index.html.

However, No Nags has — as of the time of writing this article — a lot of local transmission points, so you may want to check its main page to make sure you are accessing it at its point nearest to you. Using a closer location tends to speed download times, which you will find high-

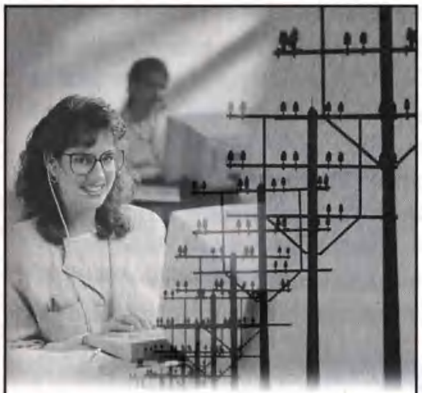
We've done research on fast food, snack food and dog food.

— Kind of reminds us of when we were poor college students. —

We've been in this business since 1976, conducting custom marketing research in over 500 consumer product and service categories. We're one of the largest privately held research firms in America. Yet we're small enough to have senior management involved with every client, ensuring personalized, responsive service. Our goal is to provide the highest quality fieldwork, virtually error-free execution, and insightful analysis. That's why we've earned the trust and repeat business of some of the most recognized companies in the world. Staying hungry helps, too. For more information, please call Mike Straus, our new CEO, at (770)818-0060.

ATLANTA • STAMFORD • MINNEAPOLIS • WINSTON-SALEM

DAC
DENNIS AND COMPANY
RESEARCH



No More Problems. Only Solutions.

When it comes to choosing a WATS telephone research house, we have your solution. PhoneSolutions. Our standard is to provide impeccable survey results, on time, and at a competitive price. We offer:

- *150 CATI stations*
- *15 hour dialing day*
- *Low-incidence respondents*
- *Hard-to-reach or tough-to-recruit respondents*
- *Medical/professional/consumer studies*
- *Programming and tabulation services*

THE TRIAD OF A PHONE SOLUTION

Quality

Competitive Price

Timeliness & Reliability

Let us show you the perfect solution to your field service needs.

Call Michael Schlegel at (212) 352-0445 or e.mail him at michael@phonesolutions.com

"Our Calling Is Your Calling"

PhoneSolutions

Tucson • Albany • New York

ly desirable once you see all the free software — tested and evaluated — stockpiled at this site.

We wind up at the right side of this tray with the fax software controller, and another nice utility called Quick View Plus that lets you get a fast look into almost file without opening its accompanying application. Quick View Plus is shareware, meaning that you are supposed to pay a small sum for it if you use it and like it. Your reviewer finds it well worth the modest outlay required.

The left tray has more pre-installed items than the one we just discussed. That is, these are present when you start Windows 98 the first time, or shortly thereafter, and you need to decide whether they stay or go. From the left of this tray, we have a nice button for starting our old friend AOL. (To all you cynics out there, I am sorry to say that AOL has been working more reliably than several other services with more cachet that your reviewer has tried and dropped.) Following this, we have Launch Outlook (the all-in-one scheduler/calendar/e-mail reader program), and "display the desktop." Completing this left tray, we have the very useful "start Windows Explorer," and a not-so-useful program that's supposed to clean out memory, but doesn't help much with the resource problem (but anyhow, that one was free).

The overall view of Windows 98

In short, we strongly recommend Windows 98, but don't expect that all the pitfalls in previous versions have been resolved. Go out and get it — it's that simple. It just works better.

Note that we have not tested this as a "server" program, and only with individual PCs, so we cannot comment on its ability to handle network-administration tasks.

Getting more out of Windows 98 on your PC

The absolute number-one reason that you will find Windows 98 running slowly is too little PC memory. You really need to have 64MB of RAM, or more, to do true "multitasking." (By the way, we should note that 64MB is exactly 24MB more than the entire capacity of the hard drive on my first PC about 10 years ago. That hard drive cost about $800 at the time, and the PC was a real killer machine, with 1 whole MB of memory.) Anyhow, now RAM is cheap, sometimes less than $1 per MB, so it pays to upgrade.

If your PC cannot accommodate more than 64MB of memory, perhaps it's time to upgrade the whole machine. Most older PCs have a market value of about $0, so perhaps you can donate the machine, or find an 8-year-old to take it. (Your author's oldest PC now resides with his 8-year-old, and it — not the 8-year-old — is happily running Windows 95, maxed out with a 486-upgrade processor and 8 whole MB of RAM.)

Another upgrade that may help an older machine is a new hard drive. With extended IDE drives in the 6GB to 8GB range going for about $150 at the time of this writing, it also pays to upgrade. We cannot suggest much use for the old drive except as a paperweight, or for giving to the 8-year-old. Do not leave the old disk hooked up for sentimental reasons. Just having an aged and sluggish hard drive on the system tends to slow your entire PC considerably.

Incidentally, there is some fine and inexpensive software out there that will help you over the considerable hurdle of switching hard drives. Just check your local PC superstore for more details.

Office 97 update

Office 97 has now had its second "service release," or set of patches and bug fixes. These patches almost always fix things that could affect you at the worst possible time. If you have not done so already, go to the Microsoft site and find out about getting this service release today. You either can download this release, or get it free via CD-ROM from Microsoft. As this release runs to about 21MB, you may not have much luck downloading it. (Your author tried three times, with the file transmission failing irreparably at between 11MB and 13MB in each instance.)

Please note that if you did not install service release 1, you will need to do this before you can proceed to service release 2. If you have not made the first upgrade, the CD-ROM is your best solution, as it has both service releases. The first release alone addressed some 600 bugs or problems — although this figure seems worse than it is, because many bugs arise only with specific combinations of hardware and software running. Given the thousands, if not millions, of possible ways in which you can combine PC components and PC programs, maybe needing to fix a few hundred possible problem areas is not so bad. You decide.

By the way, service release 2 still has not cured all the problems that Office 97 can develop. We will have more about this later.

What about Office 97? (Sorry I assumed everybody with Windows has it.) If you do not have this yet, seriously consider getting it now. Microsoft's Web page (www.microsoft.com) has an announcement posted that anybody buying Office 97 from now on will get a free upgrade to Office 2000, once it comes out.

Office 97 mostly adds many good features to its predecessor. It at last allows you to join cells in a spreadsheet or a Word table both vertically and horizontally. (Older versions only allowed horizontal merging.) PowerPoint files are not nearly as enormous as they used to be, since they now have a new format.

Actually, all the file formats are new, as most of you doubtless know. This has caused many headaches in sharing files with people who do not have this new version. Microsoft has added various patches that make sharing across program versions somewhat less burdensome, but the proliferation of file types is a real pain.

Excel now has a real Visual Basic editor in back of it. This is a vast improvement over its old system for

"Was I surprised!
Our research supplier does a lot *more* than just collect data."

"I see."

"No... ICR."

ALTHOUGH ICR has a reputation for providing quality consumer and business-to-business custom data services, we continue to *surprise* our clients with value added services...

- ☐ ***EXCEL* Omnibus** for collecting critical consumer information quickly and inexpensively.
- ☐ **Multivariate Analytical Support** to take you beyond your cross-tabs.
- ☐ **Customer Satisfaction/Loyalty** research and implementation experience to help you define and impact your business.
- ☐ **Full Custom Research** for added support to your own staff.
- ☐ **Teen *EXCEL* Omnibus** for a cost-effective alternative for reaching 12 to 17 year olds.
- ☐ **Mail Survey, Product Placement and Intercept Experience** for when telephone research doesn't fit your needs.
- ☐ **Expertise** in utilities, religion, healthcare, cable TV, PR, financial, lodging, technology, retail and packaged goods.
- ☐ **Database Development and Management.**
- ☐ **International Research** to help you reach around the world.
- ☐ **RACER**℠ Web-based system for delivery of information.

To find out more about what we can do, just call (610) 565-9280 and *see*. You may just be surprised!

ICR
International Communications Research

ICR/International Communications Research • An AUS Company
605 West State Street • Media, PA 19063 • (610) 565-9280 • Fax (610) 565-2369
E-mail: icr@mail.icrsurvey.com • Internet: http://www.icrsurvey.com
Chicago (847) 330-4465 • New York (718) 548-2683
Boca Raton (561) 988-9692 • St. Louis (314) 537-7829

handling the programming of controls and special features that you can add to your spreadsheet — if you have the interest and inclination. Excel actually generates program code in Visual Basic when you "draw" any of its predefined controls on the Excel screen. Now it's much easier to see what you have done, by looking at the code in the editor. It's all very nicely laid out for you. Help for Visual Basic is truly extensive, although some explanations are in something only faintly resembling English.

Excel unfortunately has taken away a good feature while adding other nice ones. In older versions, with little bother, you could add a menu specific to one workbook. Now if you add a special menu, it appears in all your workbooks every time you run Excel. If you want a special menu in one workbook, you have to write code eliminating all the old menus as the workbook opens, then substituting all new menus, and then at closing, restoring all the original menus.

If anybody at Microsoft is listening out there, please bring back the old, simpler system. Many of us miss it.

Excel also has lost some speed in opening for some mysterious reason. Even on a fast Pentium machine with loads of memory, it spends some time calling up an essential module called "funcres.xla." I hope that a fix for this is in the works.

More Windows 98: it practically updates itself for you

Microsoft also has automated updates for Windows 98. You simply get onto the Internet, then select the item from the "Start" menu that says "Update Windows 98." Many of these upgrades give you more system security, since thousands of people are out there trying to punch holes in Windows (there's an unintended metaphor in that, somewhere). You probably will want to make a habit of calling this feature into use every week or two.

While you are there on the Microsoft site, you probably will want to check for patches and upgrades for Office 97. As we mentioned earlier, this too is still a work in progress. Upgrades and patches for Office have appeared on the Microsoft site at least every weeks.

Office 2000 and Windows 2000 loom closer than they seem

Just as we promised at the beginning of this article, we will read the tea leaves, and try to predict what Microsoft will do in the near future.

Yes, indeed, Virginia, new versions of Office and Windows are on the way. You author was even offered a late "beta" (or test) version of Office 2000, but as he has something of a regular life, has declined it for now. I did take a close look at the one entirely new application in Office, called PhotoDraw. Otherwise, comments about the program rely somewhat on Microsoft's Web site, and more importantly, on the many critics who have dissected early versions of this product.

An Office 2000 preview

Most indications are that this new Office will be even bigger, with still more features than the current version. As mentioned just above, its major change will be the inclusion of a new PhotoDraw application. This is one piece that has been conspicuously absent from the Office Suite. We will discuss this new application right after this general overview of the new Office.

One new feature promised in connection with Office 2000 is "use-sensitive menus." That is, items that you do not use will either move down the menu, or disappear entirely after time. The descriptions that your reviewer has seen do not make it clear if items actually will vanish — and if so, if we can turn this innovation off and leave it that way.

I can see moving rarely-used items down the menu, but disapprove heartily of their vanishing. Just because you do not use a feature for

For the last year we've been telling you that one of the largest, oldest, and most-respected marketing research firms in the Northwest was located in Idaho.

We still are.

Clearwater
Research, Inc.

Quantitative • Qualitative • Human Factors • Internet
(800) 727-5016
http://www.clearwater-research.com

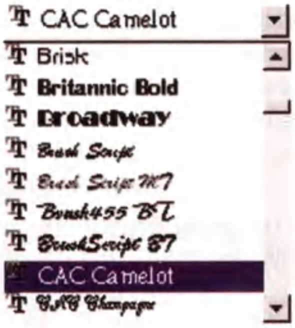
Ask about our new low-cost "Ask-It©" Survey Concept

a while does not mean you never will use it. Learning exists as a possibility in this world, but removing choices entirely from the menu seems to imply that it does not.

You may also be able to load features into Office 2000 as you need them, which would be fine if you could somehow know what they did for you, and when. I believe that Microsoft has to do more to make its products understandable if this is the direction in which they are going. For instance, I cannot find any way anywhere to get a printed listing of all the macro keys assigned in Word, and what they do. (Perhaps some clever reader knows this; I'm sure this is the kind of tip we all would like to have.)

One piece of good news is that Microsoft promises we will not have yet another set of "backward-incompatible" file formats, as we did with Office 97. Thankfully somebody at the software giant realized that not everybody upgrades, and that the three file formats now required for all Office users (of various vintages) are enough for anybody.

Many other features promised are small, but useful. All the applications will show you what a font looks like — and not just its name — when you look through the pull-down font menu. The figure following gives you an idea of how that would work, showing the menu from another piece of software that already knows how to do this.



Word also promises to add the ability to wrap text around the table. In versions to date, tables always force text above and below, even if there's ample room on the sides. This new feature should help documents look more professional.

PowerPoint is expected to introduce a three-paned window, with the slide outline to one side, and a space for adding notes on the bottom. This seems like a basically well-intended idea, but we probably will all need to go out and get 21" monitors to see all the details in all the panes.

Throughout the suite, toolbars should become easier to customize. Now you need to go through several steps to add a new button (performing some function that you want to access quickly) to the toolbar. Office 2000 promises to make this process simpler. In one step, it will show all the buttons you can choose, and allow you simply to check the ones you want and uncheck the ones that you do not.

The new PhotoDraw 2000

Microsoft here has made a brave entry, creating a single program that

Happy Trails should be routine!

As a research professional, you have lots to think about without worrying about facility details.

Meadowlands Consumer Center understands that.

Our team approach to every project assures you that no detail will ever be overlooked.

And, from the minute you walk in the door, you'll notice how our warm, friendly "home away from home" atmosphere envelops you.

- **MCC is an all-suite facility with choice of large, jumbo (seating up to 60) or mini-group settings located in a beautiful atrium building**
- **Viewing rooms with three-sided panoramic views seating 20+**
- **All rooms are fully sound-proofed with individual HVAC controls**
- **Fully supervised in-house recruiting from a highly diverse respondent pool**
- **Private client business center and separate client entrance**
- **15 minutes from Manhattan and Newark International Airport**
- **Video conferencing on premises**

Meadowlands Consumer Center Inc.
100 Plaza Drive • Secaucus, NJ 07094
800-998-4777 (outside NJ) • 201-865-4900
fax 201-865-0408

FocusVision Worldwide

can handle both photographs and drawings, applying all sorts of touch-up magic and special effects to either. It may not seem like a huge accomplishment to handle both photographs and drawings in a single program, but these have special meanings — and limitations — in the world of computers.

We will step back for a few moments here, and review the differences between "bitmaps" and "vector-based images" on the computer. A few years ago, the distinction seemed quite simple. Bitmaps were collections of dots. As you magnified a bitmapped picture, the rough edges in the dots became apparent. The jagged, square-looking image of a magnified bitmap came to stand for all things generated by a computer — or at least all bad things — for some time.

Vector-based pictures are based on lines, polygons and other shapes, and fill patterns. Early vector-based work tended to look fairly primitive in its own way, as the shapes you could use were limited, and special effects like shading, textures, and special lighting (such as shadows and highlights) usually were not even possible.

The best thing about vector-based illustrations is that their quality does not degrade as they expand. A smooth line remains smooth at any magnification, and the higher the resolution of your printer, the better the results tend to look. For instance, the True Type fonts provided by Windows (and the equivalent fonts provided by the Macintosh) are based on vectors. (You may not think of typefaces as artwork, but to your computer that is precisely what they are.) As you use printers with higher resolution, these fonts look better and better. Coming from a professional-quality machine, they will be indistinguishable from the text in a finely produced book. This advantage holds for all vector-based illustrations.

The artistic distinctions blur

Artistic types, and practical working illustrators, of course felt dissatisfied with the limitations in both basic types of image. Soon enough, the software development community found some ingenious ways to expand the capabilities of both bitmaps and vectors.

Corel Draw was the first PC-based program (gaining wide adherence) that bent the boundaries, giving vector illustrations more of the good features of bitmaps, and vice versa. For instance, even early versions of Corel Draw had special methods of filling vector-based "objects" with realistic looking textures. These textures included such "looks" as different types of stone, paper, fabric, and purely fantastic objects like "cosmic noise." The better the printer, the more realistic (and detailed) these textures look. (We should note that Corel Draw is just being used as an example here, because it has the largest share of sales of any high-end illustration program. You can find many other remarkable graphics programs, some of which even do things that Corel does not.)

Gradually, graphics programs like Corel added many other features. For instance, some give you the ability to change flat objects into three-dimensional ones with many different types of shading and perspective. Some programs even allow you to generate a shape, specify how it becomes three-dimensional, rotate it on all three axes, change the perspective, and so on. You also can fill vector-based objects with bitmapped images in all sorts of ways. In addition, rather than just drawing simple lines, you can create effects that look

Telephone Interviews
(250 CATI Stations)
Focus Groups
Taste Tests
DISCOVERY
RESEARCH GROUP
(800)678-3748

PROVIDING TOOLS FOR A COMPETITIVE ADVANTAGE

ACG RESEARCH SOLUTIONS

RAMS™ (Rapid Analysis Measurement System) Dial, an interactive electronic response technology for large groups.

Quantitative data collection utilizing computer-aided phone interviews.

A state-of-the-art focus group facility in St. Louis offering FREE videotaping.

Experienced focus group moderators and one-on-one executive interviewers.

Sophisticated database technology for analysis and warehousing.

Multivariate analyses, including conjoint analysis and perceptual mapping.

Pierre Laclede Center
7701 Forsyth Blvd.
Suite 1100
St. Louis, Missouri 63105
314-726-3403
Fax: 314-726-2503

Our staff provides the research tools Fortune 500 clients need to achieve a competitive advantage.

Let us put our experience to work for you in our new facilities.

like various brushes, pencils, pastels, and so on.

If you would like to see how sophisticated vector-based artwork has become, just go down to your local computer superstore, and look at Corel Draw 8's carton. The image you see there, which looks remarkably like a photograph of a famous film star of the 1930s and 1940s, is in fact an entirely vector-based drawing. (The star in question is Hedy Lamarr, who sued Corel for using her likeness without compensation to sell their program.)

Getting back to bitmaps, options for manipulating these have increased dramatically also. For instance, several programs allow you to "trace" this type of image, turning even very complex photographs into vector-based art that you can push, pull, and tweak in many ways. Most programs let you add special effects to any image. These typically range from the basics (such as touching-up the color balance, brightness, sharpness and contrast) to some really wild ones, such as making the image look like it is embossed on paper or engraved in various metals. (These effects are really convincing, by the way.)

Some programs even have automated procedures for fixing common flaws in photographs, such as the dreaded "red eye" caused by photo flashes. Most can remove the "speckling" or benday dot patterns that appear in newspaper pictures, remove scratches from images, and so on. In short, there's a whole world of tools out there, many of which you will never use unless you are a professional artist.

Microsoft PhotoDraw 2000
MICROSOFT OFFICE
This product is licensed to
Copyright © 1995-1998 Microsoft Corporation. All rights reserved. This program is protected by US and international copyright laws as described in Help About.

About Microsoft's PhotoDraw

After that lengthy introduction (perhaps more than you ever wanted

We put you in with all the right people.

Some focus group facilities think close is good enough.
When you hire us, you get just plain right:
Right recruits, right room, right location... and right attitude.
1998 Impulse Survey respondents said
we have the Best Recruiting in San Francisco.
We'd love to show you why...

Consumer Research Associates Superooms

Superspaces... Superecruiting... Superservice...

SAN FRANCISCO
111 Pine St., 17th Floor, San Francisco, CA 94111
800/800-5055

NEW DALLAS
Park Central VII, 12750 Merit Dr., 10th Floor, Dallas, TX 75251

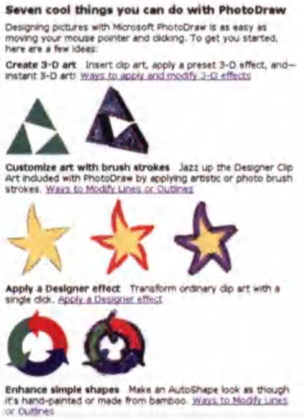
to know about illustration), let's go on to the new Microsoft program. As you now may realize, Microsoft is treading into highly competitive terrain here. They have priced their new product (assuming you buy it alone, without the rest of Office) about in the middle, at $99. At the top end, you have programs like Corel Draw (about $250 for an upgrade from an earlier version or competitive product), Adobe Photoshop (about $200 for an upgrade version), and other more specialized programs that can range over $1,000.

At the low end, you have several surprisingly powerful contenders, including a remarkable program selling for about $40, called Micrografx Windows Draw 6. This program comes, unsurprisingly, from a company named Micrografx, which has been making fine and reasonably priced graphics software in relative obscurity for years.

You likely will not need the full range of effects that a program such as Corel Draw can produce — although it is fun to play with, especially for a former technical illustrator like your reviewer. Therefore, the more pertinent comparison would be between Microsoft's PhotoDraw and a lower priced competitor, such as Micrografx's Windows Draw 6.

The Micrografx product, Windows Draw, actually consists of three modules, one for drawing (Windows Draw), one for editing photographs and other bitmaps (PhotoMagic), and one for editing 3-D objects. Therefore, it lacks the "all in one" feeling that Microsoft's PhotoDraw has. And, as the figure shows, you can do many "cool things" with PhotoDraw.

However, when we compare these programs feature-for-feature, Micrografx most often has the practical advantage. For instance, the Micrografx product (PhotoMagic) wins easily at editing and touching up photographs or screen-captured images. (Neither of these programs captures images from the screen; that task requires yet another piece of software, for instance, HiJaak Pro.)



Seven cool things you can do with PhotoDraw

Designing pictures with Microsoft PhotoDraw is as easy as moving your mouse pointer and clicking. To get you started, here are a few ideas:

Create 3-D art Insert clip art, apply a preset 3-D effect, and—instant 3-D art! Ways to apply and modify 3-D effects

Customize art with brush strokes Jazz up the Designer Clip Art included with PhotoDraw by applying artistic or photo brush strokes. Ways to Modify Lines or Outlines

Apply a Designer effect Transform ordinary clip art with a single click. Apply a Designer effect

Enhance simple shapes Make an AutoShape look as though it's hand-painted or made from bamboo. Ways to Modify Lines or Outlines

Your reviewer assiduously tried using both programs to touch up a scanned photograph that had been pasted, slightly askew, into a Word document. Microsoft's PhotoDraw mysteriously attached a large area of blank space to the top of the image, and then would not allow this to be removed. Because of the extra area on top, I never could successfully straighten the picture. With the Micrografx product, I could resize the image exactly as I wanted, using its crop tool. Then I could rotate the image, in increments of 0.01 degree, until I had it as well aligned as possible.

Micrografx also offers a superior cloning tool that allows you to pick up a portion of an image and copy it elsewhere. In their product, you have two brushes, one that copies a portion of the image, and another that deposits what you have copied. You can change the size and relative positions of these brushes, as well as the transparency (or opacity) of the image you copy, and how the edges of the copied area blend with the original image.

In fact, the illustration showing the PhotoDraw 2000 logo at the heading of this section quickly was reworked with the Micrografx product. It allowed for the seamless

Hagler Bailly™
A WORLD AHEAD

Does your survey center provide the highest quality data

to leading strategy consultants, business operations reengineers, new product development teams, and marketing communications experts?

Ours does.

Hagler Bailly's Survey Research Center

provides full-service research capabilities to our global staff of consultants for consumer and business-to-business markets. We invite you to call for assistance with your next project.

University Research Park, 455 Science Drive,
Madison, WI 53711-1058 Tel 608-232-2800
Contact Bryan Ward, E-mail research@haglerbailly.com

Hagler Bailly provides professional services to corporations and governments worldwide. The company's focus is on energy, network industries, and the environment.

Visit our Web site at www.haglerbailly.com

removal of a large banner in the image reading "30-day free trial version." (All right, so your reviewer is a little on the cheap side.) Trying to do similar surgery on the image with Microsoft's product ended in repeated failures.

Both drawing programs (which handle the vector images) have plenty of sophisticated features, although not all the same ones, and are probably about evenly matched. Both should do a good job of creating original artwork and modifying (vector-based) clip art.

This leads us directly to one final advantage of the Micrografx program. Namely, it comes with excellent collections of clip art and fonts that differ from — and therefore add to — the choices already available with the other applications in Microsoft's Office Suite. PhotoDraw simply uses the clip art that you already have with applications such as PowerPoint.

Overall, then, expect Microsoft's PhotoDraw to add new capabilities to the Office Suite. You can in fact do many new tricks (or "cool things" in Microsoft's terminology) with this program. However, it lacks both features and capabilities for editing photographs and other bit-mapped images, even when compared with a lower-priced competitor. If what you want is a way to add some new touches to your drawings, and a program completely integrated with the rest of Office, this would be a good choice for you. However, you can find more value for the money in other programs, with one strong example being the Micrografx Windows Draw 6 program.

On to Windows 2000

Windows 2000 promises to meld the technologies in its "consumer" operating system (Windows 98) and its "server" operating system (Windows NT) into one integrated — if huge — entity. Microsoft also promises that this new version of its operating system will mostly rely on the core structure or architecture of the NT product, but inherit the best of both Windows.

It will be quite intriguing to see exactly what gets into the final mix. We will wait, but not with bated breath. One thing we know for certain is that Windows 2000 will be delivered late.

Most recent press releases suggest that the product will emerge first in a server version, and then, at some time later, as a desktop (or consumer, or end user) product. The desktop version would be the one most Windows users will want. The server version should be still larger and more complex than the desktop one, with many features beloved by network administrators, concerning security, firewalls, installation on multiple PCs, and so on.

This server version looks like serious overkill when measured against typical daily user tasks — such as writing a letter to aunt Minnie, firing up an expense report, sneaking questionable content off the Internet, or creating a virus that will bring down the global telecom system.

How much of a lag can we expect between the two versions? "Six months" seems to be the modal response. Six months is special computer-talk code for "Your guess is as good as mine," or "We just might have a problem here." We have deciphered this secret code based on observing that the next version of any product always is "two months away."

Whatever the timing of the final versions of Windows 2000, what they contain should prove to be fascinating. Mixtures and inheritances almost always are. This in fact reminds your reviewer of an anecdote that you might find moderately amusing, if your interests include some of the fine arts. The story goes that Isadora Duncan, the noted dancer, approached George Bernard Shaw, the noted playwright and crabby old man, with a innovative

Sawtooth Software Just Increased Your Vocabulary...

ICE (īs) *abbr.* Individual Choice Estimation. Software for estimating individual-level utilities from CBC data.

Leading-edge researchers and academics have been investigating individual-level models from Choice data. Those methods have been **very time intensive** and **not generally practical**.

ICE is a **new approach** and the **first software package** to make **individual choice estimation** from **CBC** data **accessible** to practitioners.

Markets don't consist of clean segments. Respondents are unique. Take Choice analysis to a new level. **Call today for information and a technical paper.**

Sawtooth Software, Inc.
502 S. Still Rd. • Sequim, WA 98382-3534
360/681-2300 • 360/681-2400 (fax)
http://www.sawtoothsoftware.com

Computer Interviewing • Conjoint • Cluster Analysis

Tired of Being a Color or Number When Doing Focus Groups in New York City?

Let us turn our central *focus on you*. With one room, respondents are not intermingled and your clients receive our undivided attention and service.

Our state of the art facility features:

- One large focus room designed by experienced moderators
- Adjacent client lounge with audio-visual monitoring
- Top notch recruiting capabilities
- Experienced and professional staff to meet all your research needs

Call us when you want your research to be our #1 concern.

FOCUSCENTRAL

WHERE THE FOCUS IS ON YOU

162 Fifth Avenue at 21st Street
New York, NY 10010
Tel. **212-989-2760**
Fax 212-647-7659
e-mail info@focuscentral.com
www.focuscentral.com

proposition. She told him that they should do all that was needed to have a child together, because it would be a kind of ubermensch (or in politically correct English, superbaby), combining his brains and her body. "No," said Shaw. "Think of what would happen if it got my body and your brains."

Let's hope, then, that Microsoft hits on the right mix of features for each of its key audiences. Windows NT has always been described and promoted as the system of choice for heavy-duty uses. It also has a reputation as relatively crash-proof (at least compared to regular Windows). However, it suffers from a more awkward look and feel, and limited ability to hook up with different types of hardware.

Also, Windows NT has a reputation for being quite hungry for memory. I suppose, though, that Microsoft thinks this latter problem is going away, since even modest Pentium-class machines generally can hold up to 128MB of RAM — and some newer machines can accommodate over 1 gigabyte (1,024MB). That second figure, at least, should be plenty for a couple of generations of operating systems.

Regular Windows (of the Windows 95 and 98 varieties), by contrast, will get by on a paltry 32MB of memory quite nicely. At least it can if you are using no more than three average-size applications at one time. As we discussed earlier, regular Windows also tends to get tired and/or crash in no more than 40 hours (by my estimates) with moderately intensive use. With regular Windows, though, you can run many, many types of hardware, and all of your favorite older programs, going right back to the primitive days of DOS if you want.

Certainly, nobody could find much to fault in regular Windows' appearance — or as the industry likes to have it, its "look and feel." (All right, it's moderately foolish to have "Shut Down" on the "Start" menu, but if that's the worst we have to live with, we're fine.) Microsoft promises that Windows 2000 will both look nice and behave properly.

More size and more features do a new operating system make

No doubt, still more features will get into the Windows operating system for regular end users as well as for the server crowd (network administrators, ISP operators, and related types). A few months ago, we saw some mentions of voice recognition becoming part of the operating system. This is interesting, and can work fairly well, but requires plenty of RAM to work smoothly (probably at least 128MB, if current voice recognition offerings give any hint). Also, your author can tell you from personal experience that the computer still does a bad job recognizing you if you have a cold or the flu. Finally, if you manage to get pneumonia, you might as well hang up the voice recognition microphone until the next season.

Over the last month or two, though, mentions of voice recognition in the upcoming release of Windows have diminished. Maybe this is fading in importance as Microsoft's program developers realize what a daunting task they have in front of them, in trying to stitch together two systems that are not yet truly compatible. Perhaps Microsoft was never that serious about voice recognition in the next iteration of Windows, in any event. Maybe they just hoped to steal a little thunder from Corel's Word Perfect Suite, which comes with the highly competent Dragon System's "Naturally Speaking" as a standard feature.

Don't be misled, though — somewhere out there, visionaries are busily creating a world in which we will be urged to issue voice commands not just to computers, but to all sorts of other objects. In the future, we can expect to have everything listening to us, including cars, appliances, and even clothing. (Yes, I did see an apparently serious mention in print by somebody — presumably not on a visit from another planet — of that last possibility. Still, I remain somewhat mystified about what type of conversation I am supposed to have with my boxer shorts.)

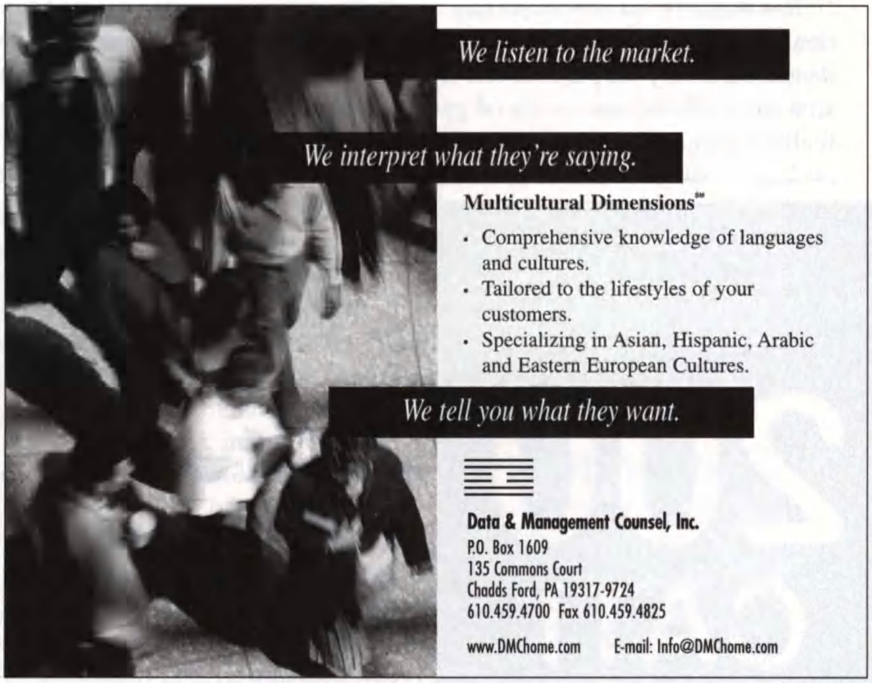
In any event, it looks like computer manufacturing economies are going to make sure we all have at least one incredibly powerful machine in the near future. Intel is predicting that by mid-2000 (as in six months before 2001), the average PC — someplace in the $1,000 to $4,000 range — should be running a Pentium III in the 600MHz to 733MHz speed range. (The Pentium II is about ready to join other old processors in the PC museum. The scheduled debut for the III is March 17.) Even "value" PCs— those selling for less than $1,000 — in this scenario could have Intel's Celeron Pentium, running at 500 or more MHz.

As of February 9, a company named Free PC emerged, with the promise of delivering PCs costing nothing for those willing to "share information about themselves" and promising to view a certain amount of "advertising and communications" on the Internet. This sounds revolting, but it too should pass. If prices drop any more quickly than they have, we might expect PCs to be given away as promotions in boxes of breakfast cereal.

Whatever the upcoming scenario, more computing power seems to ensure that Windows will remain with us, at least for the near future.

Your reviewer recalls, way back in the days of the 386 (about 1992), that some software developer at Microsoft said speed was not an issue, since the 586 processor would handle Windows easily. In those ancient times, I foolishly thought we wouldn't see anything like this available and affordable for at least 10 to 15 years. Now, my-12 year-old is complaining that the 586 PC, handed down to him two years ago, is too "pokey." And so, the inevitable trail of hardware and software upgrades continues. It may not be much, but at least it gives your reviewer something new to write about at any time.

Again, all questions and positive comments are welcome; you can reach the reviewer at this e-mail address: SMStruhl@aol.com. Complaints should be sent directly to the magazine (although we seem to have forgotten that address), preferably by barge, and in invisible ink.



We listen to the market.

We interpret what they're saying.

Multicultural Dimensions℠

- Comprehensive knowledge of languages and cultures.
- Tailored to the lifestyles of your customers.
- Specializing in Asian, Hispanic, Arabic and Eastern European Cultures.

We tell you what they want.

Data & Management Counsel, Inc.
P.O. Box 1609
135 Commons Court
Chadds Ford, PA 19317-9724
610.459.4700 Fax 610.459.4825
www.DMChome.com E-mail: Info@DMChome.com

If your product outlook is fuzzy

You probably need a focus group. Luckily we operate focus group offices in Seattle, Portland and Spokane. So at least one thing is clear, you need to call us.

Consumer Opinion Services
We answer to you
12825 1st Avenue South Seattle WA 98168
206-241-6050 FAX 206-241-5213
Ask for Jerry or Greg Carter http://www.COSvc.com

◆ Focus Groups ◆ Mall Intercepts ◆ Central Telephone ◆ Pre-Recruits ◆ Field Services

Effectiveness

continued from p. 21

pay more attention to them. And I would say, 'Well, how do we know that?' " says Lynch.

"We wanted to answer client questions and give ourselves more confidence in the way we plan our television buys. There were a lot of gut feelings and myths in this marketplace about what was right and what was wrong and it seemed very few people had ever evaluated them. Today's television world is so different than what it was 10 years ago. You have so many different choices."

200 CATI Stations!

- Multiple CATI Programs
- Well-trained Interviewers
- 24x7 Customer Service
- High Supervision Ratio
- Remote Monitoring
- Tabulation Experts
- Fast, Accurate Programmers

Telephone Data Collection Experts

(800) 486-7955

www.VentureData.com

info@VentureData.com

VentureData

The study used a sample of men and women aged 25-50. Respondents completed a demographic questionnaire and then watched one of two videos on a standard TV. Each tape contained an expensive and an inexpensive program and the same group of commercials. Tape 1 contained Program 1, a high-cost show, followed by six commercials and Program 2, a low-cost show, followed by six more commercials. Tape 2 contained Program 3, a different low-cost show, followed by the same six commercials and then Program 4, a different high-cost show, followed again by the same six commercials as those at the end of Tape 1. After viewing the tape, respondents completed a questionnaire on their interest in and attentiveness to the programs they had just watched.

Lynch was initially concerned about the small samples. "Capita said 10 to 12 was fine and I said, 'I'd be more comfortable with a few more.' But actually when we evaluated eight or nine to see how stable the results are, they were fine at 10 and 12," she says.

"The more specific you are about the questions you're asking, the better results you're going to get, even more so with this kind of technology because you're looking at small samples and you need to be focused on your recruitment criteria, any pre- and post- questions that you ask, and the actual segments of the programs and the ads that you're showing them."

Impact lasted

The research found that the commercials after the higher EI-scoring programs earned higher EI scores. "It was surprising how much more effective the ads were in this particular environment. That's not going to be the case for all commercials but for the ones we tested it was," Lynch says.

And higher cost didn't necessarily lead to higher engagement. Program 2 (a low-cost show) and Program 4 (a high-cost show) earned the highest EI scores. "We could distinguish a difference between the programs and it wasn't always related to the marketplace's traditional valuation [based on the cost of ad time]. There were significant differences in attention levels and they did impact attention to the ads. The patterns we saw applied to just about every test we did. If there was a difference it carried throughout the break," Lynch says.

Respondents' preconceived feelings about a show affected their subjective ratings of it but didn't carry over to the show's EI. The program with the highest CPP as well as the highest Nielsen ratings earned the highest subjective scores and EI measurements. In contrast, one of the low-cost/low-rated programs earned high EI scores from respondents who hadn't seen the show before. The two shows earning lower EI scores kept loyal viewers engaged but didn't hold the attention of casual viewers.

"The study has made us feel a lot more confident about some of the changes in clients' television schedules that we've been recommending. We've also had lots of ideas for new things we can test. We feel strongly about the importance of putting the ads in the right programs," Lynch says.

More projects in mind

Lynch says she has a number of projects in mind based on client questions. If the right application comes along, she'll use brainwave analysis again. "It was the perfect methodology for what we wanted to test. It's an innovative technique. We won't use it for everything but it's another in our array of tools.

"I think we feel more comfortable overall with our understanding about how TV advertising works. There are a million things you can learn and you just need to keep digging. It's not acceptable now for me to say 'I don't know.' I've got to try and get some of the answers."

ROI

continued from p. 23

looked at a variation of recall-based telephone tracking surveys. To try to avoid the problems of recall and get closer to recognition, the interviewer reads a description of the ad or commercial to the respondent. Results from this approach published by Eric DuPlessis[4] convinced them this was only a halfway solution. The number that qualified as having seen the ads increased, but only half as much as they do in a true recognition test.

Another consideration was the variety of advertising they wanted to test, and that got back to the basic objectives of the study. They wanted to find out where the firm stood in terms of all the advertising about health plans being conducted in the market during that period. And, the campaign was a brand-building effort so they wanted to see if any of it was having an effect on the image of health plans among the population as a whole.

The advertising to be evaluated included seven print ads, six TV commercials and two radio commercials. Only about half were for BlueCross BlueShield of Minnesota. The rest were for competitors.

Methodology

How do you get a recognition-based test of media as dissimilar as that? One way is to approach people at random in malls and invite them into an interviewing facility where all the ads are shown and all the commercials are played. That is a perfectly valid approach, one that BRC has used thousands of times. But one of the requirements here was to keep the cost down. So we wanted to avoid those relatively expensive personal interviews.

How? We started by calling a random cross section of households throughout their marketing area. The objective was to see if the advertising was increasing people's awareness of the firm and making them think more favorably of it. So the first two things we asked were how familiar they were with the health care plans in the area, and which were best in a number of attributes. Then we played a radio commercial to them over the phone. The name of the advertiser had been bleeped out, so in addition to asking if they recognized it, we could find out if it communicated the most important piece of information any advertisement has to get across. We asked if they remembered who it was for.

The phone interview was kept short and stripped to the essentials for good reason. At the end we said we would like to show them some pictures and ask questions that would be in a questionnaire we would mail to them; 650 said they would fill it out and return it. After a single follow-up, 62 percent did. That gave us 405 respondents who completed both the telephone and the mail surveys. This is the sample that the remainder of the

FOR CUSTOMER AND EMPLOYEE SURVEYS IT MAKES SENSE TO GO WITH THE FIRST CHOICE IN IVR INTERVIEWING.

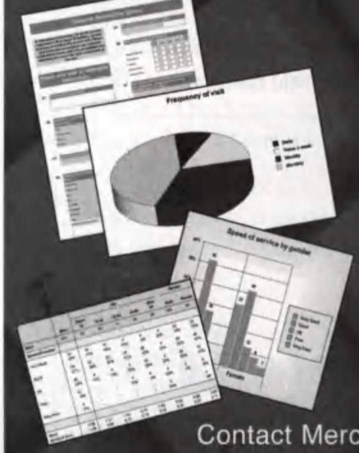
COMMON KNOWLEDGE
MARKETING INFORMATION FOR THE 21ST CENTURY BUSINESS

The first and still the best for large or small surveys. If you are using or considering comment cards, in-store interviews, outbound telephone or mystery shoppers, consider the superior benefits of inbound 1-800 Interactive Voice Response Interviewing: **Achieve high response rates with low cost per interview.** • 35 interviews for about the cost of one mystery shop. • **Hear comments and suggestions in customer's own words and own voice.** • Data or analysis available almost immediately. • **Generate a more representative response profile.** • Engage your customers in a positive, rewarding, enjoyable and convenient manner that won't interfere with store operations. • **Eliminate interviewer bias.**

For Interactive Voice Response Interviewing, Internet and E-mail data collection; field service or full service; call the first choice of researchers nationwide and learn more about how effective our services can be for the 21st century business.

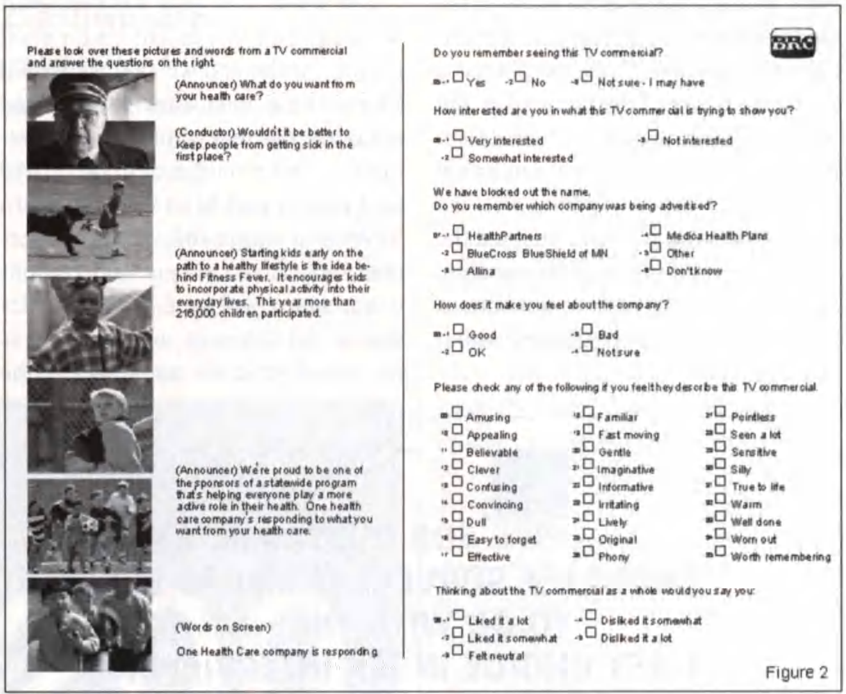
Common Knowledge Research Services
16200 Dallas Pkwy. #140 Dallas, TX 75248
Voice: 1.800.710.9147 • Fax: 972.732.1447
www.commonknowledge.com E-Mail: info@commonknowledge.com

snap® survey software ... the smartest way from Q to A™



- WYSIWYG Questionnaire Design.
- Data Entry including CATI and CAPI.
- Data Analysis to produce crosstabs, charts and statistics.
- Apply your own in-house styles, or our pre-designed templates to your surveys.
- Integrate your findings into other software packages.

Contact Mercator at 1-800-997-SNAP
phone 978-463-4093 fax 978-463-9375
email us at: sales@mercatorCorp.com http//www.mercatorCorp.com



Please look over these pictures and words from a TV commercial and answer the questions on the right

(Announcer) What do you want from your health care?

(Conductor) Wouldn't it be better to Keep people from getting sick in the first place?

(Announcer) Starting kids early on the path to a healthy lifestyle is the idea behind Fitness Fever. It encourages kids to incorporate physical activity into their everyday lives. This year more than 216,000 children participated.

(Announcer) We're proud to be one of the sponsors of a statewide program that's helping everyone play a more active role in their health. One health care company's responding to what you want from your health care.

(Words on Screen)

One Health Care company is responding

Do you remember seeing this TV commercial?

☐ Yes ☐ No ☐ Not sure - I may have

How interested are you in what this TV commercial is trying to show you?

☐ Very interested
☐ Somewhat interested
☐ Not interested

We have blocked out the name.
Do you remember which company was being advertised?

☐ HealthPartners
☐ BlueCross BlueShield of MN
☐ Allina
☐ Medica Health Plans
☐ Other
☐ Don't know

How does it make you feel about the company?

☐ Good
☐ OK
☐ Bad
☐ Not sure

Please check any of the following if you feel they describe this TV commercial.

☐ Amusing
☐ Appealing
☐ Believable
☐ Clever
☐ Confusing
☐ Convincing
☐ Dull
☐ Easy to forget
☐ Effective
☐ Familiar
☐ Fast moving
☐ Gentle
☐ Imaginative
☐ Informative
☐ Irritating
☐ Lively
☐ Original
☐ Phony
☐ Pointless
☐ Seen a lot
☐ Sensitive
☐ Silly
☐ True to life
☐ Warm
☐ Well done
☐ Worn out
☐ Worth remembering

Thinking about the TV commercial as a whole would you say you:

☐ Liked it a lot
☐ Liked it somewhat
☐ Felt neutral
☐ Disliked it somewhat
☐ Disliked it a lot

Figure 2

results are based on. Each page of the mail questionnaire contained BRC's standard battery of diagnostic questions. Pages for the print advertising included a copy of the ad with the name blocked out (Fig. 1, p. 23).

To see if they recognize the TV commercials we show a photo board and script (Fig. 2). Again, all references to the advertiser are blocked out, and the same set of diagnostics are included.

BRC has been testing the recognition of commercials using both personal interviews, where people see the actual commercial on a monitor, and this type of mail questionnaire for more than 20 years. We have scores of directly comparable parallel tests that show there is a correlation of .88 between the percent that recognize commercials in these mail surveys and the percent that recognize them when they see the actual commercial. That means the mail surveys give you 77 percent, or most of what you get from personal interviews.

But the cost of doing it this way is just about half of what it costs to do it with shopping center intercepts and personal interviews. So you are trading-off a known and relatively modest decrease in accuracy for a substantial decrease in cost. With budgets for print advertising often being smaller than TV, this can make recognition-based tracking of print feasible for a lot more print campaigns. Further, this is a service targeted to

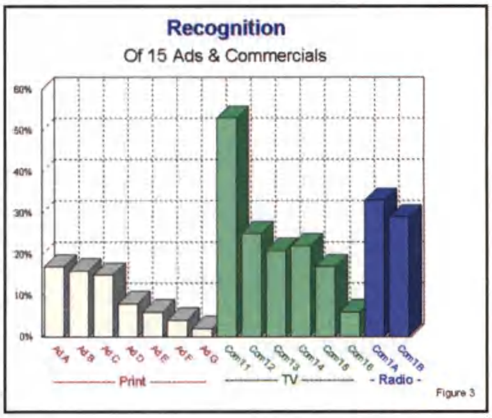


Figure 3

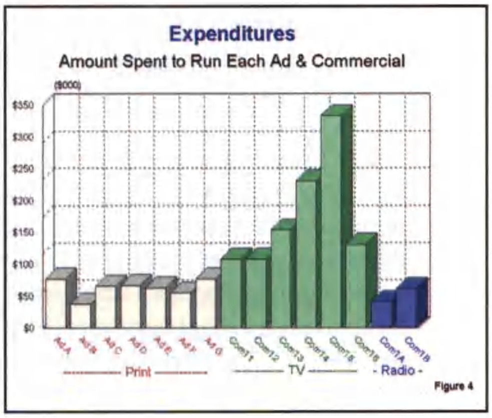


Figure 4

SSI-SNAP

OBJECTIVE:

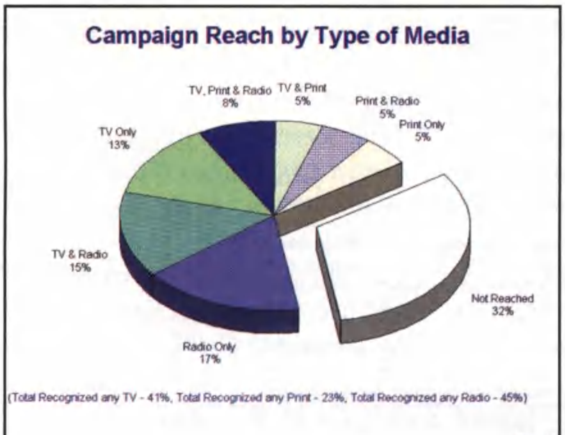
Immediate access to sample any time of the day or night.

SSI SOLUTION:

Debra Rosenthal (Director of Field Operations at **KRC Research & Consulting**) — "If the study is for a crisis in communications research, we don't have the luxury of time. We need a response immediately. I appreciate the timing that SNAP offers and its ease of use. The other thing I really like about SNAP is that I can sit down at 7:00 in the evening, when things calm down, and order sample. SNAP is there for me when I'm available. SNAP is wonderful and it's 99.99% foolproof!"

Call SSI for sampling solutions at 203-255-4200 or send e-mail to info@ssisamples.com.

Survey Sampling, Inc.®
Partners with survey researchers since 1977



(Total Recognized any TV - 41%, Total Recognized any Print - 23%, Total Recognized any Radio - 45%)

Figure 5

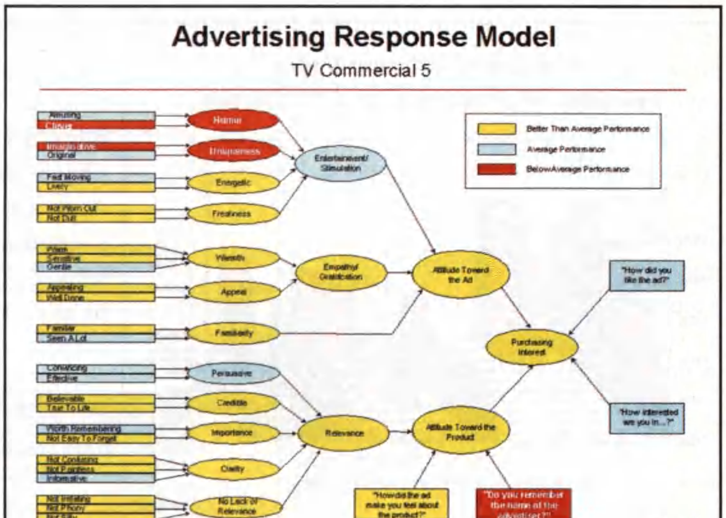

Advertising Response Model
TV Commercial 5
Better Than Average Performance
Average Performance
BelowAverage Performance
Amusing
Clever
Imaginative
Original
Fast Moving
Lively
Not Worn Out
Not Dull
Warm
Sensitive
Gentle
Appealing
Well Done
Familiar
Seen A Lot
Convincing
Effective
Believable
True To Life
Worth Remembering
Not Easy To Forget
Not Confusing
Not Pointless
Informative
Not Irritating
Not Phony
Not Silly
Humor
Uniqueness
Energetic
Freshness
Warmth
Appeal
Familiarity
Persuasive
Credible
Importance
Clarity
No Lack of Relevance
Entertainment/ Stimulation
Empathy/ Gratification
Relevance
Attitude Toward the Ad
Attitude Toward the Product
Purchasing Interest
"How did you like the ad?"
"How interested are you in...?"
"How did the ad make you feel about the product?"
"Do you remember the name of the advertiser?"

Figure 6

virtually everybody, so this approach also helps overcome the upscale skew inherent in mall intercept interviewing. What did we find in this case?

Results

Figure 3 shows the percent that recognized each of the 15 ads and commercials in the test. It varied widely, from a high of 53 percent for one TV commercial to a low of 2 percent for one of the print ads. The two radio commercials came in second and third.

Figure 3 shows why those favoring print might be reluctant to get into a head-to-head comparison between media. Usually you will find fewer people noticing ads. But you don't usually spend as much on your print campaign, and that has to be factored into a study like this. Figure 4 shows what was spent to run each of the ads and commercials in this study.

Expenditures that covered the year before the test varied widely. But the variations don't match the differences in recognition — not one bit! The odds that we are going to turn up meaningful differences in advertising efficiency have just increased.

The recognition scores also show something else: the percent of the public being reached by each medium, and by each combination of media. The pie chart in Figure 5 shows print reached a total of 23 percent. TV reached 41 percent. That was a relatively small difference, considering the average expenditure for airing the TV commercials was more than double the amount spent to run the average ad.

Why were people more likely to notice some of these ads or commercials and ignore others? The battery of diagnostic questions in Figures 1 and 2 produces the advertising response model, or ARM, shown in Figure 6, and that tells you why. This ARM is for the commercial shown in Figure 2.

This model was described earlier in a 1996 ARF talk[5], so we won't go into detail about it here. It is enough to note the white areas. They show people noticed this commercial because its warmth and appeal generated a greater than average amount of empathy. Further, the high level of relevance people found in the message also contributed to the greater than average score for purchasing inter-

Power
Sensus
Interviewing
Software provides
the building
blocks to create
the surveys of
your dreams.

Beauty
With Sensus
Interviewing
Software, it's
easy to create
stunning
questionnaires
that will engage
your respondents
and impress
your clients.

Visit our web site @ www.sawtooth.com or call us at 847/866-0870.

Magic
With Sensus
Interviewing
Software,
you intuitively
create exciting,
expressive and
enjoyable
surveys.

sensus

Sawtooth Technologies, Inc. 1007 Church Street Evanston, Illinois 60201

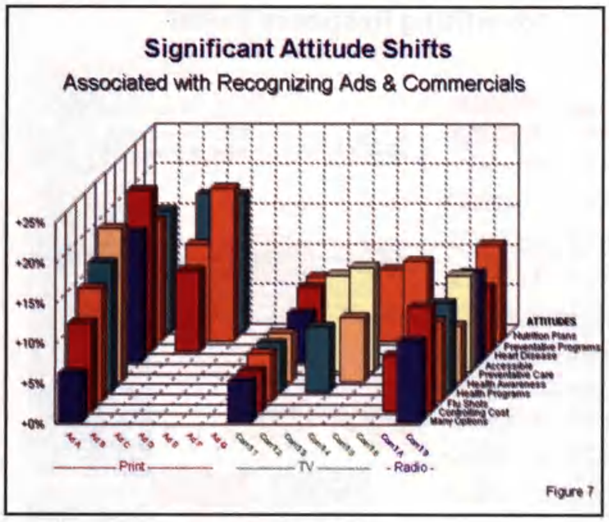


Figure 7

est. That's unusual. Today most commercials capture attention through their entertainment value.

Two of the below-average performance scores were for a lack of humor. The third gives reason for concern. The number of recognizers who knew who it was for was below average. A commercial can't help you if people don't realize it is about your product or service. This wasn't a fatal flaw because all of the advertising it was competing against was also below average in getting the name across. And although the number that knew who it was for was below average, the number was still substantial: 37 percent.

Capturing attention and getting the name across are two essentials that are still overlooked all too frequently in advertising research. If you don't capture attention and get the name across, the magic of advertising doesn't even have a chance to start working. But now that we have measured both, we are ready for the next key question.

Did these ads and commercials have any effect on the people they did reach? We measure that with attitude shifts.

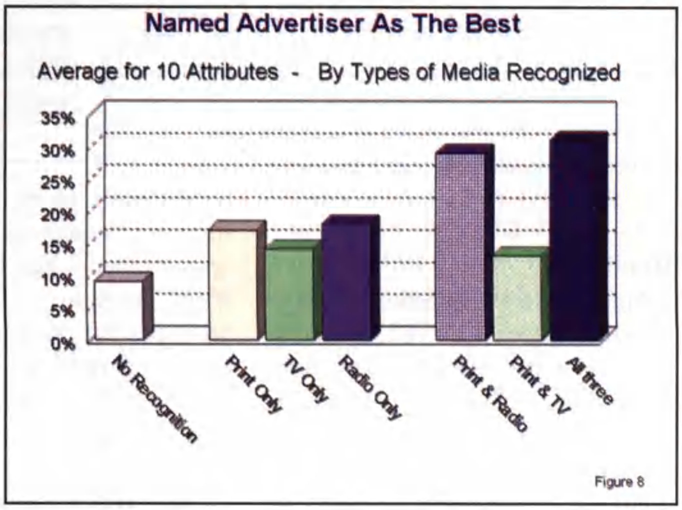
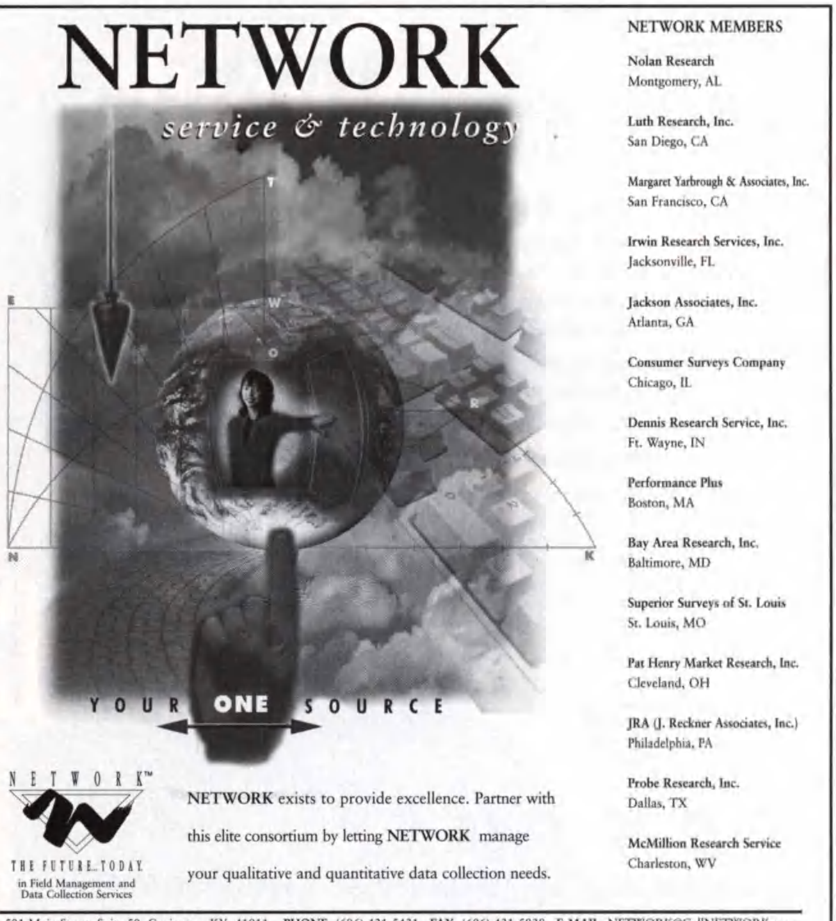


Figure 8

We asked which health care plan they felt was best on 10 different attributes. We asked that in the first part of the telephone interview so the advertising we showed them later couldn't affect their answers. Then we looked to see if those who recognized an ad were more likely to name the advertiser than those who didn't see the ad. The results are shown in Figure 7.

If the percent naming the advertisers was significantly higher among those who noticed the advertising, that generated one of the bars on this chart. You'll find that seeing some ads and commercials is associated with significant lifts on almost all attributes. Others only had shifts on a few attributes, and some showed no significant effects. You see some differences between the media. Earlier we had seen that print ads tended to be noticed by a smaller segment of the population. Here we see those who noticed print ads tended to show the biggest improvements in attitudes. That was true for some, but not all of the ads.



NETWORK exists to provide excellence. Partner with this elite consortium by letting NETWORK manage your qualitative and quantitative data collection needs.

NETWORK MEMBERS

Nolan Research
Montgomery, AL

Luth Research, Inc.
San Diego, CA

Margaret Yarbrough & Associates, Inc.
San Francisco, CA

Irwin Research Services, Inc.
Jacksonville, FL

Jackson Associates, Inc.
Atlanta, GA

Consumer Surveys Company
Chicago, IL

Dennis Research Service, Inc.
Ft. Wayne, IN

Performance Plus
Boston, MA

Bay Area Research, Inc.
Baltimore, MD

Superior Surveys of St. Louis
St. Louis, MO

Pat Henry Market Research, Inc.
Cleveland, OH

JRA (J. Reckner Associates, Inc.)
Philadelphia, PA

Probe Research, Inc.
Dallas, TX

McMillion Research Service
Charleston, WV

501 Main Street Suite 50 Covington, KY 41011 PHONE (606) 431-5431 FAX (606) 431-5838 E-MAIL NETWORK@CallNETWORK.com

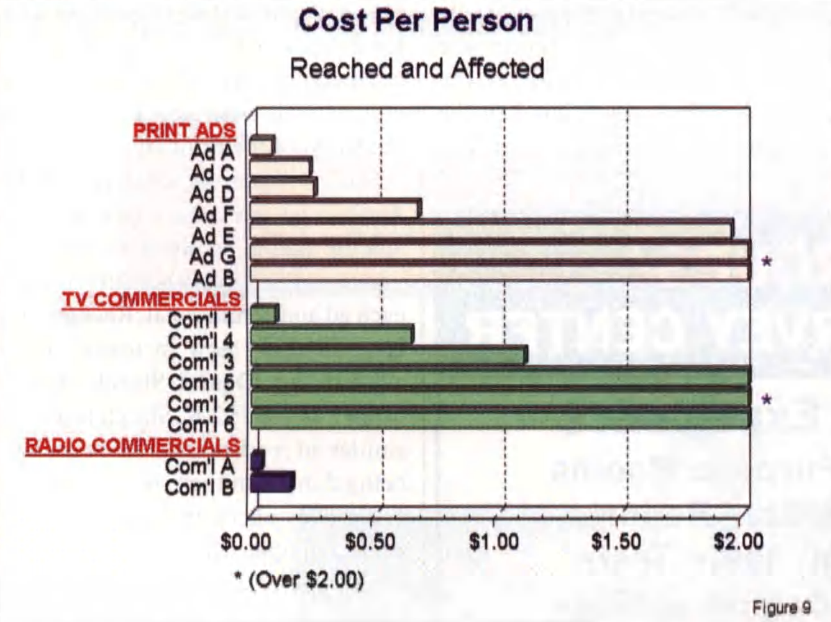


Figure 9

Synergy

This type of information can be used to answer many key questions about the performance of advertising campaigns. But this is a session where we are comparing media, so Figure 8 shows how this type of tracking data can be used to compare media and see if there is any synergy to be gained from using a combination of media.

Starting at the left, the white bar shows when we averaged the scores for all the attributes, we found that among those who didn't recognize any of the advertising, 9 percent named the advertiser as best. The next three show the results for those that recognized advertising from only one of the three media. It shows that in this case print was better than TV and about the same as radio, but the differences were relatively small. The last three bars show larger increases are associated with exposure to several media. Those reached by print and radio show the two work better in concert than separately. Those reached by print and TV show no such synergy.

ROI

To get to our final measures of return on investment we combine all of this into a measure of overall impact for each ad and commercial. We take the percent that recognized an ad or commercial and multiply it by the average shift among recognizers — the increase in the percent saying the advertiser is best. For the population as a whole, that gives us the lift that was related to noticing that ad or commercial. In short, the percent reached and affected. We projected that to the population, and divided the total amount spent to run the ad or commercial by the number reached and affected. That produced Figure 9 showing the cost per person reached and affected by each of those ads and commercials.

Now we have some results that are clear-cut and easy to read. Some of these ads and commercials are reaching and affecting people at a very low cost per person. Others are off the chart. The mathematically sophisticated may recognize this as an asymptotic function. As the number of people reached and affected by an ad or commercial approaches zero the cost per person approaches infinity. Hence the off-the-chart scores.

These final results are specific to this type of product, in one market, where one specific set of ads and commercials had been running prior to the test. Our intent is to show this type of study can be done for any product in any market. We don't mean to imply the differences we found among media in this test are typical. But with those important qualifications out of the way, let's look at what we found. Print ads were certainly competitive with commercials. Each medium had at least one ad or commercial that was unusually cost efficient.

Both print and TV had ads and commercials that were so inefficient that they were off the scale. We didn't have enough radio commercials to show how much variation we might find in that medium.

The most important thing this study

FOCUS ON
EL PASO
HOT MARKET
OF THE 90'S

Twenty-eight line phone center with 20 CRT stations for computer assisted interviewing, and nationwide market coverage, with bilingual interviewers available.

Specially designed 3200 square feet, free standing focus group facility. Large 20' X 20' conference room, two level viewing room (seats 15), full kitchen, audio, video, expert recruiting, one-on-ones, executive, professional, medical, Hispanic recruiting a specialty. "Se habla Espanol".

Permanent mall facility also available in the region's largest mall.

Call Linda Adams
Owner and Director

(915) 591-4777
FAX (915) 595-6305

AIM RESEARCH

10456 Brian Mooney Avenue
El Paso, Texas 79935
(Twenty-five Years in El Paso)

showed was there are enormous differences in the cost per person reached and affected by ads and commercials. A company that is running those efficient ads and commercials is getting a lot more for their advertising dollars. These differences are related to the creative side of the advertising. It is not related to the medium. The best of the print ads reached and affected people at a lower cost than the worst of the TV commercials. And the best of the TV commercials were more efficient than the worst of the print ads.

Did we meet our objectives? We wanted to get a fair comparison among media, so we used recognition to see how many actually noticed each ad and commercial. Recognition isn't anything new in testing print advertising. Daniel Starch started using it in the 1920s. Starch tests and similar ad readership studies are still being done. But there is a key difference: They check recognition of ads among people who have read a specific issue of a magazine. That can certainly be useful, but it doesn't give you a basis for comparing ads and commercials. We met that need by doing recognition-based tracking among a cross section of the entire market. We didn't incur the higher cost of using personal interviews to show things to people and control the order in which they are exposed. We did it all with a combination phone and mail survey.

Valid comparison

This, then, is what we worked out as an answer to that opening question. We feel it shows you can make valid comparisons between ads and commercials, and when you do, you can find situations like this where advertising in print can prove every bit as effective as advertising on TV.

---

[1] Documentation of these points and additional references are found in several sources: Schaefer, Wolfgang: "Recognition Reconsidered," *Marketing and Research Today*, ESOMAR, May 1995; Singh/Rothschild/Churchill: "Recognition vs. Recall as Measures of TV Commercial Forgetting," *Journal of Marketing Research*, 2/88; Krugman, Herbert E., "Low Recall and High Recognition of Advertising," *Journal of Advertising Research*, Feb/Mar 1986: BRC Technical Memo # 58, BRC, 1983.

[2] Haley & Baldinger: "The ARF Copy Research Validity Project," *Journal of Advertising Research*, April/May 1991.

[3] Lodish, et al: "How Advertising Works," *Journal of Marketing Research*, May 1995.

[4] DuPlessis, Eric: "Recognition vs. Recall," *Journal of Advertising Research*, May/June 1994.

[5] Bruzzone, Donald E. and Deborah J. Tallyn, "Linking Tracking to Pretesting with an 'ARM'," *Journal of Advertising Research*, May/June 1997.

FOCUS GROUPS/ CLEVELAND SURVEY CENTER

Over 35 Years Experience
Three Large Multi-Purpose Rooms
Mock Juries, Moderator-Reports
Product Placement, Taste Tests
Pre-Recruits, Videoconferencing

We are the only centrally located facility serving all parts of greater Cleveland/Akron & vicinity

Just 15 min. from downtown & Hopkins Airport
Call: 800-950-9010 or 216-901-8075
Fax: 216-901-8085 or 216-642-8876

Survey
the
World

with MrSurvey.com

MrSurvey was designed as an easy way for companies to conduct surveys over the Worldwide Web. Our Web service bureau will set up and administer your survey on the Internet. We can supply the survey data to you for processing or you can take advantage of our own comprehensive data processing service. We can do everything from setting up your survey for interviewing to providing the data or final tables.

MrSurvey is the Perfect Start to Web Interviewing
Visit Us at MrSurvey.com

Star Data Systems, Inc.
E-Mail: Sales@MrSurvey.com

N. Palm Beach, FL: (561) 842-4000
Chicago, IL: (773) 794-0400

Looking for a job?

The Quirk's Job Forum

QUIRK'S
Marketing Research Review

Moderator MarketPlace™

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

Advanced Insights
1118 Pendleton St.
Cincinnati, OH 45202
Ph. 513-381-1450
Fax 513-381-1455
E-mail: mickey.mcrae@mci2000.com
Contact: Catherine "Mickey" McRae
A Full-Service, Multi-Cultural Research Company.

Alexander + Parker
30 Almaden Ct.
San Francisco, CA 94118
Ph. 415-751-0613
Fax 415-751-3620
E-mail: alexpark@compuserve.com
www.alexpark.com
Contact: Sherry Parker
Observational/Ethnographic Rsch., Food/Bev., Package Goods, Healthcare.

Jeff Anderson Mktg. Rsch. Consulting
1545 Hotel Circle S., Ste. 130
San Diego, CA 92108
Ph. 619-566-3269
Fax 619-295-6645
E-mail: JAMRC@aol.com
Contact: Jeff Anderson
"Blending Art With Science." Member QRCA/AMA.

HISPANIC & ASIAN
MARKETING COMMUNICATION
RESEARCH, INC.

Asian Marketing Communication Research/Div. of H&AMCR, Inc.
1301 Shoreway Rd., Ste. 100
Belmont, CA 94002
Ph. 650-595-5028
Fax 650-595-5407
E-mail: AsianDiv@hamcr.com
www.hamcr.com
Contact: Sandra M.J. Wong, Ph.D.
Qual./Quant. Full-Service Research In U.S. & Asia. Cantonese, Mandarin, Japanese, Korean, Vietnamese, Tagalog.

Automotive Insights, Inc.
Sports Insight
58 Egbert St.
Bay Head, NJ 08742
Ph. 732-295-2511
Fax 732-295-2514
E-mail: Autoins@aol.com
Contact: Douglas Brunner
Full-Service Research For Automotive and Sports Industries. Focus Groups/Product Clinics/Sports Events.

AutoPacific, Inc.
12812 Panorama View
Santa Ana, CA 92705-6306
Ph. 714-838-4234
Fax 714-838-4260
E-mail: karxprt1@ix.netcom.com
Contact: George Peterson
Auto Marketing & Product Experts. 1300 Groups Moderate & Recruit.

BAIGLOBAL

BAIGlobal Inc.
580 White Plains Rd.
Tarrytown, NY 10591
Ph. 914-332-5300
Fax 914-631-8300
E-mail: kpermut@baiglobal.com
Contact: Kate Permut
We Maximize The Power Of Qualitative Res. To Get The Clear, Concise Results You Need For Real Business Decision-Making.

Behavior Research Center, Inc.
1101 N. First St.
P.O. Box 13178
Phoenix, AZ 85002-3178
Ph. 602-258-4554
Fax 602-252-2729
E-mail: brc@primenet.com
Contact: Earl de Berge
Contact: Luis N. Ortiz
Bilingual; U.S./Latin Amer.; 35+ Yrs. Exp.; All Subjects.

Milton I. Brand Marketing Consultant
20300 Civic Center Dr., Ste. 207
Southfield, MI 48076
Ph. 248-223-0035
Fax 248-223-0036
E-mail: MILBRA@aol.com
Contact: Milton Brand
New Products - Qualitative Research & Consulting.

Burr Research/Reinvention Prevention
4760 Fremont Ave.
Bellingham, WA 98226
Ph. 360-671-7813
Fax 360-671-7813
E-mail: BURRRESEAR@aol.com
Contact: Robert L. Burr, FLMI, CLU
Providing Answers Via Actionable Survey, Focus Group, And 1-on-1 Research. Financial Services Consulting. 30+ Yrs. Experience.

C&R Research Services, Inc.
500 N. Michigan Ave. 12th fl.
Chicago, IL 60611
Ph. 312-828-9200
Fax 312-527-3113
E-mail: info@crresearch.com
www.cr-research.com
Contact: Jim Flannery
Leading Supplier Of Qual. Rsch. In The U.S. With Over 30 Yrs. of Experience.

Cambridge Associates, Ltd.
2315 Fairway Ln.
Greeley, CO 80634
Ph. 800-934-8125
Fax 970-339-8313
E-mail: walt_kendall@prodigy.com
Contact: Walt Kendall
Finest In Focus Grp. Prep., Mod. & Analysis. Call To Discover The Difference.

Cambridge Research, Inc.
5831 Cedar Lake Rd.
St. Louis Park, MN 55416
Ph. 612-525-2011
Contact: Dale Longfellow
High Tech, Executives, Bus.-To-Bus., Ag., Specifying Engineers.

Campos Market Research, Inc.
216 Blvd. of the Allies
Pittsburgh, PA 15222
Ph. 412-471-8484
Fax 412-471-8497
E-mail: campos@campos.com
Contact: R. Yvonne Campos
Full-Service Mkt. Rsch. Firm - Consumer & Bus.-to-Bus.

Chalfont Healthcare Research, Inc.
4275 County Line Rd., #112
Chalfont, PA 18914-2212
Ph. 215-412-2388
Fax 215-855-9993
E-mail: laura@chalfonthealth.com
www.chalfonthealth.com
Contact: Laura Swart
Full Service, Healthcare Specialization, Experience, References. Details at www.chalfonthealth.com.

Consumer Opinion Services
12825-1st Ave. South
Seattle, WA 98168
Ph. 206-241-6050
Fax 206-241-5213
E-mail: cos-info@cosvc.com
www.cosvc.com
Contact: Jerry Carter
Consumer, Business Groups and One-On-Ones.

Creative Focus, Inc.
209 The South Chace
Atlanta, GA 30328
Ph. 404-256-7000
Fax 404-347-8800
E-mail: vardis@mindspring.com
www.aimsinc.com/creativefocus
Contact: Harry Vardis
Foc. Grps., Ideation, Name Dev., Strategic/Planning Sessions.

Cultural Insights, Inc.
10510 Buckeye Trace
Goshen, KY 40026
Ph. 502-228-3708
Fax 502-228-2829
E-mail: insights@ntr.net
www.culturalinsights.org
Contact: Michael C. Sack
Non-profit Firm Specializing In Christian Religious Studies, Community Needs Analysis & Cross-Cultural Research.

Cunningham Research Associates
2828 W. Parker Rd., Ste. B202
Plano, TX 75075
Ph. 972-596-4072
Fax 972-964-3404
E-mail: crasearch@aol.com
Contact: Mark W. Cunningham
Qual. & Quant. Rsch., Consumer, Advg., Bus./Bus., Hi-Tech.

Daniel Associates
49 Hill Rd., Ste. 4
Belmont, MA 02278
Ph. 617-484-6225
Fax 800-243-3493
E-mail: sdaniel@earthlink.net
www.earthlink.net/~sdaniel
Contact: Stephen Daniel
FOCUS/IT Understanding Technology Buying Processes.

Data & Management Counsel, Inc.
P.O. Box 1609 / 135 Commons Ct.
Chadds Ford, PA 19317
Ph. 610-459-4700
Fax 610-459-4825
E-mail: WZL4DMC@aol.com
Contact: Bill Ziff-Levine
Extensive Experience In Domestic & International Qualitative Research.

Decision Analyst, Inc.
604 Ave. H East
Arlington, TX 76011-3100
Ph. 817-640-6166
Fax 817-640-6567
E-mail: jthomas@decisionanalyst.com
www.decisionanalyst.com
Contact: Jerry W. Thomas
Depth Motivation Research. National Firm.

Decision Drivers
197 Macy Rd.
Briarcliff, NY 10510-1017
Ph. 914-923-0266
Fax 914-923-3699
Contact: Sharon Driver
Actionable Results To Drive Your Market Decisions.

Directions Data Research
1111 Northshore Dr.
Knoxville, TN 37919-4046
Ph. 423-588-9280
Fax 423-584-5960
E-mail: rbryant@directionsdata.com
Contact: Rebecca Bryant
Advanced RIVA-Trained Moderator/Focus Facility/Phonebank.

Doane Marketing Research, Inc.
1807 Park 270 Dr., Ste. 300
P.O. Box 46904
St. Louis, MO 63146
Ph. 314-878-7667
Fax 314-878-7616
E-mail: dtugend@doanemr.com
Contact: David M. Tugend
Largest Full-svc. Agri./Vet. Care/Pet Prod. Mkt. Rsch. Co.

Dolobowsky Qual. Svcs., Inc.
94 Lincoln St.
Waltham, MA 02451
Ph. 781-647-0872
Fax 781-647-0264
E-mail: Reva Dolobowsky@worldnet.att.net
Contact: Reva Dolobowsky
Experts In Ideation & Focus Groups. Formerly with Synectics.

Moderator MarketPlace™

The Dominion Group Marketing Research & Consulting, Inc.
8229 Boone Blvd., Ste. 710
Vienna, VA 22182
Ph. 703-848-4233
Fax 703-848-9469
Contact: Catherine Hinton
Full-Service Marketing Research. Health Care & Pharmaceuticals.

Doyle Research Associates, Inc.
919 N. Michigan/Ste. 3208
Chicago, IL 60611
Ph. 312-944-4848
Fax 312-944-4159
E-mail: dralynn@earthlink.net
Contact: Kathleen M. Doyle
Full Svc. Qual. Five Staff Moderators. Varied Expertise.

D/R/S HealthCare Consultants
121 Greenwich Rd., Ste. 209
Charlotte, NC 28211
Ph. 704-362-5211
Fax 704-362-5216
E-mail: drsimon@mindspring.com
www.drmsimon.com
Contact: Dr. Murray Simon
Specialists in Research with Providers & Patients.

Elrick and Lavidge
1990 Lakeside Parkway
Tucker, GA 30084
Ph. 770-621-7600
Fax 770-621-7666
E-mail: elavidge@atl.mindspring.com
www.elavidge.com
Contact: Susan Kimbro
Full-Service National Capability.

Erlich Transcultural Consultants
21241 Ventura Blvd., Ste. 193
Woodland Hills, CA 91364
Ph. 818-226-1333
Fax 818-226-1338
E-mail: Etcethnic@aol.com
www.etctranscultural.com
Contact: Andrew Erlich, Ph.D.
Full Svc. Latino, Asian, African-Amer., Amer. Indian Mktg. Rsch.

FADER
& ASSOCIATES

Fader & Associates
372 Central Park W., Ste. 7N
New York, NY 10025
Ph. 212-749-3986
Fax 212-749-4087
Contact: Susan Fader
Exp. In Broad Range of Cat., Rsch. Specialties Include New Products, Repositioning, Concept Dev., Creative Diag.

The Farnsworth Group
2601 Fortune Circle E., Ste. 200
Indianapolis, IN 46241
Ph. 317-241-5600
Fax 317-227-3010
E-mail: Farns@indy.net
Contact: Debra Hartman
Advancing Marketing Concepts Through Research.

Findings International Corporation
9100 Coral Way, Ste. 6
Miami, FL 33165
Ph. 305-225-6517
Fax 305-225-6522
E-mail: findings@interfindings.com
Contact: Marta Bethart
Hispanic Specialists, Focus Groups, One-on-Ones.

First Market Research Corp.
656 Beacon St., 6th floor
Boston, MA 02215
Ph. 800-FIRST-11 (347-7811)
Fax 617-267-9080
E-mail: jmr10@ziplink.net
www.firstmarket.com
Contact: Jack M. Reynolds
Hospitals, Physicians, Bio-Tech, Advertising, Retail Chains.

First
Market
Research

First Market Research Corp.
2301 Hancock Drive
Austin, TX 78756
Ph. 800-FIRST-TX (347-7889)
Fax 512-451-5700
E-mail: jheiman@firstmarket.com
www.firstmarket.com
Contact: James R. Heiman
High Tech, Publishing, Bus.-To-Bus., Telecommunications.

Linda Fitzpatrick Research Svcs. Corp.
102 Foxwood Rd.
West Nyack, NY 10994
Ph. 914-353-4470
Fax 914-353-4471
www.fitzpatrickmarketing.com
Contact: Linda Fitzpatrick
Since 1985, Expert In Marketing/Group Dynamics.

FOCUS PLUS

Focus Plus, Inc.
79 5th Avenue
New York, NY 10003
Ph. 212-675-0142
Fax 212-645-3171
E-mail: focusplus@msn.com
Contact: John Markham
Impeccable Cons. & B-B Recruits/Beautiful New Facility.

4J's Market Research Services, Inc.
211 E. 43rd St.
New York, NY 10017-4704
Ph. 877-658-7724 (877-MKT-RSCH)
Fax 877-693-2987 (877-NY-FAX-US)
Contact: Donna Peters

graff works

GraffWorks Marketing Research
10178 Phaeton Dr.
Eden Prairie, MN 55347
Ph. 612-829-4640
Fax 612-829-4645
E-mail: Graffworks@aol.com
Contact: Carol Graff
Distribution Channel Rsch., Bus.-to-Bus. New Prod. Dev.; Key Decision Maker Recruit., Meeting Facilitation.

Greenleaf Associates, Inc.
470 Boston Post Rd.
Weston, MA 02193
Ph. 617-899-0003
Contact: Dr. Marcia Nichols Trook
Nat'l./Int'l. Clients. Specialty: New Products, Direct Mktg., Publishing.

Hammer Marketing Resources
179 Inverness Rd.
Severna Pk. (Balt./D.C.), MD 21146
Ph. 410-544-9191
Fax 410-544-9189
E-mail: bhammer@gohammer.com
www.gohammer.com
Contact: Bill Hammer
15th Year. Business-to-Business and Consumer.

Pat Henry Market Research, Inc.
230 Huron Rd. N.W., Ste. 100.43
Cleveland, OH 44113
Ph. 216-621-3831
Fax 216-621-8455
Contact: Mark Kikel
Luxurious Focus Group Facility. Expert Recruiting.

Suzanne Higgins Associates
151 Maple Ave.
Old Saybrook, CT 06475
Ph. 860-388-5968
Fax 860-388-5968
E-mail: Higgins.S@worldnet.att.net
Contact: Suzanne Higgins
Advtg./Pkg. Gds. 16+ Yrs. Exp. (9 With Top NY Ad Agency.)

HISPANIC & ASIAN
MARKETING COMMUNICATION
RESEARCH, INC.

Hispanic Marketing Communications Research/Div. of H&AMCR, Inc.
1301 Shoreway Rd., Ste. 100
Belmont, CA 94002
Ph. 650-595-5028
Fax 650-595-5407
E-mail: gateway@hamcr.com
www.hamcr.com
Contact: Felipe Korzenny, Ph.D.
Qual./Quant. Full-svc. Research In Spanish & Portuguese. Focus Groups, In-Depth Interviews In U.S. & Latin America.

Holleran Consulting
2951 Whiteford Rd.
York, PA 17402
Ph. 717-757-2802 or 800-941-2168
Fax 717-755-7661
E-mail: info@holleranconsult.com
www.holleranconsult.com
Contact: Melinda Fischer
Women's and Minority Research Is Our Specialty.

Horowitz Associates, Inc.
1971 Palmer Avenue
Larchmont, NY 10538
Ph. 914-834-5999
Fax 914-834-5998
E-mail: HorowitzA@compuserve.com
Contact: Howard Horowitz
Cable/Video Marketing-Programming-Telecommunications-Internet.

I+G Medical Research International
33 College Hill Rd., Bldg. 10C
Warwick, RI 02886
Ph. 401-823-4900
Fax 401-823-4903
E-mail: info@igmedresearch.com
Contact: Mary Clement
Contact: Monique Rinner
New Product Development, Health Care, QRCA Member.

Image Engineering, Inc.
10510 Buckeye Trace
Goshen, KY 40026
Ph. 502-228-1858
Fax 502-228-2829
E-mail: imageeng@ntr.net
www.BrandRetail.com
Contact: Michael C. Sack
Specialist In Image-based Projective Qualitative Research, Small Sample/Red Flag Testing &Package Design Evaluation.

InModeration
Qualitative Research

InModeration
3801 Conshohocken Ave., #816
Philadelphia, PA 19131
Ph. 215-871-7770
Fax 215-871-7773
E-mail: inmoderation@erols.com
Contact: Dean Bates
Qualitative Research Focus Groups For All Industries.

Irvine Consulting, Inc.
2207 Lakeside Drive
Bannockburn, IL 60015
Ph. 847-615-0040
Fax 847-615-0192
E-mail: IRVES224@msn.com
Contact: Ronald J. Irvine
Pharm/Med: Custom Global Quan./Qual. Res. & Facility.

JRH Marketing Services, Inc.
29-27 41st Ave. (Penthouse)
New York, NY 11101
Ph. 718-786-9640
Fax 718-786-9642
E-mail: 72114.1500@compuserve.com
Contact: J. Robert Harris II
Founded 1975. Check Out The Rest But Use The Best!

JUST THE FACTS®
YOUR INFORMATION SOURCE

Just The Facts, Inc.
P.O. Box 365
Mt. Prospect, IL 60056
Ph. 847-506-0033
Fax 847-506-0018
E-mail: facts2@interaccess.com
www.just-the-facts.com
Contact: Bruce Tincknell
Highly Skilled; Well Organized; Maintains Controll, While Enabling Creative Flow; Strategic Moderating; Actionable Results; 25 Yrs. Experience.

Kerr & Downs Research
2992 Habersham Dr.
Tallahassee, FL 32308
Ph. 850-906-3111
Fax 850-906-3112
E-mail: PD@kerr-downs.com
www.kerr-downs.com
Contact: Phillip Downs
Master Moderator - The Moderator Makes or Breaks a Focus Group.

Moderator MarketPlace™

Kiyomura-Ishimoto Associates
130 Bush St., 10th fl.
San Francisco, CA 94104-3826
Ph. 415-984-5880
Fax 415-984-5888
E-mail: norm@kiassociates.com
www.hiassociates.com
Contact: Norman P. Ishimoto
RIVA-Certified; Full-Service Q&Q Research Firm.

Knowledge Systems & Research, Inc.
500 South Salina St., Ste. 900
Syracuse, NY 13202
Ph. 315-470-1350
Fax 315-471-0115
E-mail: HQ@krsinc.com
www.krsinc.com
Contact: Lynn Van Dyke
Full-Svce. All Expertise In-House. Strategic Foc. Bus. to Bus. All Inds.

Langer Associates, Inc.
19 W. 44th St., Ste. 1600
New York, NY 10036
Ph. 212-391-0350
Fax 212-391-0357
E-mail: Research@Langerassc.com
www.Langerassc.com
Contact: Judith Langer, President
Qualitative Research On Marketing/Lifestyle Studies.

Lieberman Research Worldwide
1900 Avenue of the Stars
Los Angeles, CA 90067
Ph. 310-553-0550
Fax 310-553-4607
E-mail: kgentry@lrw-la.com
Contact: Kevin Gentry
20+ Yrs. Custom Qual./Quant. Market Research Solutions.

London Research
18062 Irvine Blvd., Ste. 200
Tustin, CA 92780-3328
Ph. 714-505-0920
Fax 714-505-0874
E-mail: LRL@LondonResearch.com
www.londonresearch.com
Contact: Ray W. London, Ph.D., M.B.A.
Comp. Stratg. Conslt. Qual./Quant., Prep./Mod./Anlys., Focus, Mtg. Facilitation, Bus./Med./Litg./Fin./Pol. Pros.

Low + Associates, Inc.
5454 Wisconsin Ave., Ste. 1300
Chevy Chase, MD 20815
Ph. 301-951-9200
Fax 301-986-1641
E-mail: research@lowassociates.com
Contact: Nan Russell
Health/Fin./Cust. Sat. Upscale FG Facility. Recruit from MD, DC, N. VA.

Macro International
11785 Beltsville Dr.
Calverton, MD 20705-3119
Ph. 301-572-0200
Fax 301-572-0999
E-mail: halverson@macroint.com
Contact: Lynn Halverson
Large Staff of Trained Moderators Available in Many Areas.

Mari Hispanic Field Service
2030 E. Fourth St., Ste. 205
Santa Ana, CA 92705
Ph. 714-667-8282
Fax 714-667-8290
E-mail: mari.h@ix.netcom.com
Contact: Mari Ramirez Lindemann
Spanish Lang. Mod., 17 Yrs. Exp. Qual./Quant., Domestic/X-Country.

Market Connections, Inc.
13814 S. Springs Dr.
Clifton, VA 20124
Ph. 703-818-2476
Fax 703-818-3730
E-mail: mktcnnect@aol.com
Contact: Lisa Dezzutti
Full-Service, Actionable Results, Gov't. Experience.

Market Directions, Inc.
911 Main St., Ste. 300
Kansas City, MO 64105
Ph. 816-842-0020
Fax 816-472-5177
E-mail: terri@marketdirections.com
www.marketdirections.com
Contact: Terri Maize
Full-Service Market Research.

Market Navigation, Inc.
Teleconference Network Div.
2 Prel Plaza
Orangeburg, NY 10962
Ph. 914-365-0123
Fax 914-365-0122
E-mail: Ezukergo@mnav.com
E-mail: GRS@mnav.com
www.mnav.com
Contact: Eve Zukergood
Contact: George Silverman
Med., Bus.-to-Bus., Hi-Tech, Indust., Ideation, New Prod., Tel. Groups.

Market Research Associates
2082 Business Center Dr., Ste. 280
Irvine, CA 92612
Ph. 714-833-9337
Fax 714-833-2110
E-mail: bajfoster@aol.com
Contact: Barbara Fields
Extensive Experience Moderating Variety of Subjects.

Marketeam Associates
1807 Park 270 Dr., Ste. 300
P.O. Box 46904
St. Louis, MO 63146
Ph. 314-878-7667
Fax 314-878-7616
E-mail: cblock@doanemr.com
Contact: Carl Block
Consumer Health Prods., Sm. Appliances, Litigation/Mock Jury Rsch.

Marketing Advantage Rsch. Cnslts., Inc.
2349 N. Lafayette St.
Arlington Heights, IL 60004
Ph. 847-670-9602 or 800-935-4220
Fax 847-670-9629
E-mail: mjrichards@aol.com
Contact: Marilyn Richards
New Product Development/Hi-Tech/Multimedia/Telecomm.

Marketing Matrix, Inc.
2566 Overland Ave., Ste. 716
Los Angeles, CA 90064
Ph. 310-842-8310
Fax 310-842-7212
E-mail: mmatrix@primenet.com
Contact: Marcia Selz
Foc. Grps., In-Depth Intvs. & Surveys For Financial Svce. Companies.

Markinetics, Inc.
P.O. Box 809
Marietta, OH 45750
Ph. 614-374-6615
Fax 614-374-3409
E-mail: coleman@markinetics.com
Contact: Donna Coleman
Senior Transportation Industry Experts. All Audiences.

MCC Qualitative Consulting
100 Plaza Dr.
Secaucus, NJ 07094
Ph. 201-865-4900 or 800-998-4777
Fax 201-865-0408
Contact: Andrea Schrager
Insightful, Innovative, Impactful, Action-Oriented Team Approach.

Meczka Marketing/Rsch./Cnsltg., Inc.
5757 W. Century Blvd., Lobby Level
Los Angeles, CA 90045
Ph. 310-670-4824
Fax 310-410-0780
Contact: Anthony Diaz
Qual./Quant. Rsch. 25 Yrs. Exp. Recruit & Facility.

MedProbe™ Inc.
600 S. Hwy. 169, Ste. 1410
Minneapolis, MN 55426-1218
Ph. 612-540-0718
Fax 612-540-0721
Contact: Asta Gersovitz, Pharm.D.
MedProbe™ Provides Full Qualitative & Advanced Quantitative Market Research Including SHARECAST℠ & SHAREMAP℠.

The Mercury Group, Inc.
8 W. 38th St., 8th fl.
New York, NY 10018
Ph. 212-997-4341
Fax 212-768-7105
E-mail: TMGDB@aol.com
Contact: David Berman
Medical Mkt. Research By Marketers. W/Full Reports.

Michelson & Associates, Inc.
Strategic Marketing Research

Michelson & Associates, Inc.
1900 The Exchange, Ste. 360
Atlanta, GA 30339
Ph. 770-955-5400
Fax 770-955-5040
E-mail: focus@onramp.net
www.michelson.com/research
Contact: Mark L. Michelson
Much More Than Moderation Nat'l. Full-Svc. Qual./Quant.

MindSearch
272 Whipple Rd.
Tewksbury, MA 01876
Ph. 978-640-9607
Fax 978-640-9879
E-mail: msearch@ziplink.net
Contact: Julie Shaylor
Direct Marketing, Sm. Bus., Bus./Bus., Execs./Profs.

Francesca Moscatelli
506 Ft. Washington Ave., 3C
New York, NY 10033
Ph. 212-740-2754
Fax 212-923-7949
E-mail: francesca@bigplanet.com
http://dwp.bigplanet.com/qualitative
Contact: Francesca Moscatelli
Latino Bi-Lingual/Bi-Cultural Groups; QRCA Member.

Northwest Research Group, Inc.
400 108th Ave., N.E., Ste. 200
Bellevue, WA 98004
Ph. 425-635-7481
Fax 425-635-7482
E-mail: ethertn@nwrg.com
www.nwrg.com
Contact: Jeff Etherton
Facilities, Moderating, Full-Service Market Research.

Outsmart Marketing
2840 Xenwood Ave.
Minneapolis, MN 55416
Ph. 612-924-0053
Contact: Paul Tuchman
Full-Service Nationwide Research.

Perception Research Services, Inc.
One Executive Dr.
Ft. Lee, NJ 07024
Ph. 201-346-1600
Fax 201-346-1616
E-mail: prseye@aol.com
www.prsresearch.com
Contact: Joe Schurtz
Expertise In Packaging, Merchandising, Advertising, Corporate Identity, Direct Marketing And Internet Marketing.

Performance Research
25 Mill St.
Newport, RI 02840
Ph. 401-848-0111
Fax 401-848-0110
E-mail: focus@performanceresearch.com
www.performanceresearch.com
Contact: William Doyle
Corporate Sponsorship Of Major Sports And Special Events.

Primary Insights, Inc.
801 Warrenville Rd., Ste. 185
Lisle, IL 60532
Ph. 630-963-8700
Fax 630-963-8756
E-mail: deb@primary-insights.com
Contact: Deb Parkerson
Sensitive Topics. Ideation. In-Depth Analysis. Action-Oriented Recommendations.

Moderator MarketPlace™

QS&A Research & Strategy
1800 Diagonal Rd.
Alexandria, VA 22314
Ph. 703-502-7610 or 800-229-5489
Fax 703-502-0467
E-mail: SarahF49@aol.com
www.worldweb.net/~strategy/
Contact: Sarah Fulton
Three Moderators. Executive and Depth Interviews.

RESEARCH CONNECTIONS

Research Connections, Inc.
414 Central Ave.
Westfield, NJ 07090
Ph. 908-232-2723
Fax 908-654-9364
www.researchconnections.com
Contact: Amy J. Yoffie, President
Online Focus Groups At Our Virtual Focus Facility. Nat'l./Int'l. Recruit By Web Intercept, Phone, E-mail, Internet Panel. Test Web Sites, Ads, Concepts.

The Research Edge
1711 W. County Rd. B, Ste. 107S
Roseville, MN 55113
Ph. 612-628-9196
Fax 612-628-9198
E-mail: research.edge@worldnet.att.net
Contact: Cheryl Schwichlenberg
Spec. In Service Industries; Med., B-to-B, Fin. Svcs., Gov't.

Jay L. Roth & Associates, Inc.
27 First St.
Syosset, NY 11791-2504
Ph. 516-921-3311
Fax 516-921-3861
E-mail:JayLRothAssoc@compuserve.com
Contact: Jay L. Roth
Expert Moderator & Marketer Delivers on Promises! 20 Years Experience! Great Groups, Insights & Reports!

Rothenberg Consulting Group
524 Sandpiper Circle
Nashville, TN 37221
Ph. 615-309-0701
Fax 615-309-0702
E-mail: jrothenbg@aol.com
Contact: Joyce Rothenberg
Specializing In Service Businesses With 13 Years Experience In Restaurants And Hospitality.

Paul Schneller - Qualitative
300 Bleecker St., 3rd fl.
New York, NY 10014
Ph. 212-675-1631
Contact: Paul Schneller
Full Array: Ads/Pkg Gds/Rx/B-to-B/ Ideation (14+ Years).

Schwartz Consulting Partners
5027 W. Laurel St.
Tampa, FL 33607
Ph. 813-207-0332
Fax 813-207-0717
E-mail: rod@schwartzresearch.com
www.shwartzresearch.com
Contact: Rodney Kayton
Qualitative Rsch./Consult. Restaurant/Food/Bev./Video Conf.

SIL: Worldwide Marketing Services
7601 N. Federal Hwy., Ste. 205-B
Boca Raton, FL 33487
Ph. 561-997-7270
Fax 561-997-5844
E-mail: sil@siltd.com
www.siltd.com
Contact: Timm Sweeney
Qualitative Specialists Since 1983. Business-to-Business & International.

James Spanier Associates
120 East 75th St.
New York, NY 10021
Ph. 212-472-3766
Contact: Julie Horner
Focus Groups And One-On-Ones In Broad Range Of Categories.

Spiller Research Group, Inc.
950 S. Tamiami Trail, #208
Sarasota, FL 34236
Ph. 800-330-1533
Fax 941-951-1576
E-mail: mrckeeper@aol.com
Contact: Dave Copeland
Medical & Consumer.

Strategic Focus, Inc.
6456 N. Magnolia Ave.
Chicago, IL 60626
Ph. 773-973-7573
Fax 773-973-0378
E-mail: DonaJ@aol.com
Contact: Dona Vitale
Brand & Organizational Development Strategy, Target Audience Analysis, Message Communication Research.

Strategy Research Corporation
100 N.W. 37 Avenue
Miami, FL 33125
Ph. 305-649-5400
Fax 305-643-5584
E-mail: bpadilla.mfinc-ah@marketfacts.com
www.strategyresearch.com
Contact: Belkist Padilla, V.P.
Multi-Country/Multi-Market Foc. Grp. Rsch. U.S./Latin Amer./Caribbean. Native Brazilian Moderator.

Sunbelt Research Associates, Inc.
1001 N. U.S. One, Ste. 310
Jupiter, FL 33477
Ph. 561-744-5662
Contact: Barbara L. Allan
20+ Years Exp.; Business & Consumer Studies; Nat'l. & Int'l. Exp.

SuperDatos

SuperDatos de México
A Subsidiary of H&AMCR, Inc.
Ensenada 61, Colonia Hipódromo
México D.F., CP 06100
México
Ph. 650-595-5028 (U.S.)
Fax 650-595-5407 (U.S.)
E-mail: SuperDatos@hamcr.com
www.hamcr.com
Contact: Jennifer Mitchell
Full-Svc. Research to U.S. Standards Throughout Mexico. Focus Grps., In-depth Interviews, Intercepts. Luxury Facility.

Target Market Research Group, Inc.
4990 S.W. 72 Ave., Ste. 110
Miami, FL 33155-5524
Ph. 800-500-1492
Fax 305-661-9966
E-mail: martin_cerda@tmrgroup.com
www.tmrgroup.com
Contact: Martin Cerda
Hispanic Qual./Quant. Research-National Capability.

Thorne Creative Research
2900 Purchase St., Ste. 2-1
Purchase, NY 10577
Ph. 914-694-3980
Fax 914-694-3981
E-mail: gthorne@thornecreative.com
www.thornecreative.com
Contact: Gina Thorne
Sensitive Issues/Actionable Results With Kids, Teens, and Hi-Tech.

Treistman & Stark Marketing, Inc.
Two University Plaza, Ste. 301
Hackensack, NJ 07601
Ph. 201-996-0101
Fax 201-996-0068
E-mail: tsmi@carroll.com
Contact: Joan Treistman
Experts In Innovation Approaches Including ENVISION™, Focus Groups.

Valley Research, Inc.
1800 S.W. Temple, Ste. A226-1
Salt Lake City, UT 84115-1851
Ph. 801-467-4476
Fax 801-487-5820
E-mail: dennis.valley@valley-research.com
http: www.valley-research.com
Contact: Dennis L. Guiver
30 Yrs. Exp. New Facility.

VILLAGE MARKETING, INC.
The Courtyard at Skippack Village
3900 Skippack Pike, P.O. Box 1407
Skippack, PA 19474
Ph. 610-584-9808 or 610-584-7800
Fax 610-584-9818
E-mail: jamesjpartner@msn.com
Contact: James J. Partner
Custom Qual. & Quant. Actionable Insights!

WB&A, Inc.
2191 Defense Hwy., Ste. 401
Crofton, MD 21114
Ph. 410-721-0500
E-mail: WBandA@aol.com
Contact: Steve Markenson
Four Mods. on Staff Spec. in Health Care, Fin. Svcs., Education, Adv. Rsch.

Wilson Qualitative Research Consultants
20 Boulevard de Courcelles
75017 Paris
France
Ph. 33-1-39-16-94-26
Fax 33-1-39-16-69-98
E-mail: jonwqrc@club-internet.fr
Contact: Jonathan Wilson
Full Qual Svc. Fr./Eng. Strong Auto, IT, Advg. Exp.

Wolf/Altschul/Callahan, Inc.
60 Madison Ave.
New York, NY 10010
Ph. 212-725-8840
Fax 212-213-9247
Contact: Judi Lippert
Senior Moderators - 25 Years Experience.

Yarnell, Inc.
110 Sutter St., Ste. 811
San Francisco, CA 94104
Ph. 415-434-6622
Fax 415-434-0475
E-mail: SYarnell@Yarnell-Research.com
Contact: Steven M. Yarnell, Ph.D.
New Product Development & Positioning. HW/SW Companies.

Moderator MarketPlace™

GEOGRAPHIC CROSS-INDEX OF MODERATORS

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

Arizona
Behavior Research Center, Inc.

California
Alexander + Parker
Jeff Anderson Mktg. Rsch. Consulting
Asian Marketing
  Communication Research
AutoPacific, Inc.
Erlich Transcultural Consultants
Hispanic Marketing
  Communication Research
In Focus Consulting
Kiyomura-Ishimoto Associates
Lieberman Research Worldwide
London Research
Mari Hispanic Field Services
Market Research Associates
Marketing Matrix, Inc.
Meczka Mktg./Rsch./Cnsltg., Inc.
Yarnell, Inc.

Colorado
Cambridge Associates, Ltd.

Connecticut
Suzanne Higgins Associates

Florida
Findings International Corporation
Kerr & Downs Research
Schwartz Consulting Partners
SIL: Worldwide Marketing Services
Spiller Research Group, Inc.
Strategy Research Corporation
Sunbelt Research Associates, Inc.
Target Market Research Group, Inc.

Georgia
Creative Focus, Inc.
Elrick and Lavidge
Michelson & Associates, Inc.

Illinois
C&R Research Services, Inc.
Doyle Research Associates
Irvine Consulting, Inc.
Just The Facts, Inc.
Leichliter Assoc. Mktg. Rsch./Idea Dev.
Marketing Advantage Rsch. Cnslts.
Primary Insights, Inc.
Strategic Focus, Inc.

Indiana
The Farnsworth Group

Kentucky
Cultural Insights, Inc.
Image Engineering, Inc.

Maryland
Hammer Marketing Resources
Low + Associates, Inc.
Macro International
WB&A, Inc.

Massachusetts
Daniel Associates
Dolobowsky Qual. Svcs., Inc.
First Market Research Corp. (Reynolds)
Greenleaf Associates, Inc.
MindSearch

Michigan
Milton I. Brand Marketing Consultant

Minnesota
Cambridge Research, Inc.
GraffWorks Marketing Research
MedProbe™ Inc.
Outsmart Marketing
The Research Edge

Missouri
Doane Marketing Research, Inc.
Market Directions, Inc.
Marketeam Associates

New Jersey
Automotive Insight, Inc.
MCC Qualitative Consulting
Perception Research Services, Inc.
Research Connections, Inc.
Treistman & Stark Marketing, Inc.

New York
BAIGlobal Inc.
Decision Drivers
Fader & Associates
Linda Fitzpatrick Rsch. Svcs. Corp.
Focus Plus, Inc.
4J's Market Research Services, Inc.
Horowitz Associates, Inc.
JRH Marketing Services, Inc.
Knowledge Systems & Research, Inc.
Langer Associates, Inc.
Market Navigation, Inc.
The Mercury Group, Inc.
Francesca Moscatelli
Jay L. Roth & Associates, Inc.
Paul Schneller - Qualitative
James Spanier Associates
Thorne Creative Research
Wolf/Altschul/Callahan, Inc.

North Carolina
D/R/S HealthCare Consultants

Ohio
Advanced Insights
Pat Henry Market Research, Inc.
Markinetics, Inc.

Pennsylvania
Campos Market Research, Inc.
Chalfont Healthcare Research, Inc.
Data & Management Counsel, Inc.
Holleran Consulting
InModeration
VILLAGE MARKETING, INC.

Rhode Island
I+G Medical Research International
Performance Research

Tennessee
Directions Data Research
Rothenberg Consulting Group

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

Utah
Valley Research, Inc.

Virginia
The Dominion Group Mktg. Rsch.
Market Connections, Inc.
QS&A Research & Strategy

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

France
Wilson Qualitative Research Consultants

Mexico
SuperDatos de México

SPECIALTY CROSS-INDEX OF MODERATORS

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

ADVERTISING
Advanced Insights
Jeff Anderson Mktg. Rsch. Consulting
Milton I. Brand Marketing
  Consultant
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Cambridge Research, Inc.
Creative Focus, Inc.
Decision Drivers
Dolobowsky Qual. Svcs., Inc.
Erlich Transcultural Consultants
Fader & Associates
First Market Research Corp. (Reynolds)
Suzanne Higgins Associates
Market Connections, Inc.
Lieberman Research Worldwide
Outsmart Marketing
Jay L. Roth & Associates, Inc.
Rothenberg Consulting Group
Paul Schneller - Qualitative
Strategy Research Corporation
Treistman & Stark Marketing, Inc.
WB&A, Inc.
Wolf/Altschul/Callahan, Inc.

AFRICAN-AMERICAN
Advanced Insights
Erlich Transcultural Consultants
Holleran Consulting
JRHMarketing Services, Inc.

AGRICULTURE
Cambridge Associates, Ltd.
Cambridge Research, Inc.
Doane Marketing Research, Inc.
Market Directions, Inc.

ALCOHOLIC BEV.
C&R Research Services, Inc.
Strategy Research Corporation

ARTS & CULTURE
Strategic Focus, Inc.

ASIAN
Asian Marketing
  Communication Research
Asian Perspective, Inc.
Data & Management Counsel, Inc.
Erlich Transcultural Consultants
Kiyomura-Ishimoto Associates

ASSOCIATIONS
Low + Associates, Inc.
Market Directions, Inc.

AUTOMOTIVE
Automotive Insights/Sports Insight
AutoPacific, Inc.
C&R Research Services, Inc.
Erlich Transcultural Consultants
Matrixx Marketing-Research Div.

BIO-TECH
Irvine Consulting, Inc.
Market Navigation, Inc.
MedProbe, Inc.

BRAND/CORPORATE IDENTITY
Perception Research Services, Inc.

BUS.-TO-BUS.
Access Research, Inc.
Asian Marketing
  Communication Research
BAIGlobal Inc.
Behavior Research Center, Inc.
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Cambridge Research, Inc.

Campos Market Research, Inc.
Consumer Opinion Services
Creative Focus, Inc.
Data & Management Counsel, Inc.
Fader & Associates
First Market Research Corp. (Heiman)
Linda Fitzpatrick Rsch. Svcs. Corp.
Pat Henry Market Research, Inc.
Just The Facts, Inc.
Kiyomura-Ishimoto Associates
Knowledge Systems & Research, Inc.
Langer Associates, Inc.
Lieberman Research Worldwide
Market Connections, Inc.
Market Directions, Inc.
Markinetics, Inc.
MCC Qualitative Consulting
The Research Edge
Jay L. Roth & Associates, Inc.
Paul Schneller - Qualitative
SuperDatos de México
Yarnell, Inc.

CABLE
C&R Research Services, Inc.
Horowitz Associates, Inc.

CHILDREN
C&R Research Services, Inc.
Doyle Research Associates
Fader & Associates
Greenleaf Associates, Inc.
Image Engineering, Inc.
Just The Facts, Inc.
Lieberman Research Worldwide
Macro International
Market Navigation, Inc.
Matrixx Marketing-Research Div.
Outsmart Marketing
Thorne Creative Research

COMMUNICATIONS RESEARCH
Access Research, Inc.
Cambridge Associates, Ltd.
Creative Focus, Inc.
QS&A Research & Strategy
Jay L. Roth & Associates, Inc.
Rothenberg Consulting Group

COMPUTERS/MIS
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Daniel Associates
Fader & Associates
First Market Research Corp. (Heiman)
Greenleaf Associates, Inc.
Marketing Advantage Rsch. Cnslts.
James Spanier Associates
Yarnell, Inc.

CONSUMERS
Behavior Research Center, Inc.
C&R Research Services, Inc.
Consumer Opinion Services
Decision Drivers
Greenleaf Associates, Inc.
Pat Henry Market Research, Inc.
Just The Facts, Inc.
Knowledge Systems & Research, Inc.
Langer Associates, Inc.
Macro International
Marketeam Associates
Marketing Advantage Rsch. Cnslts.
Jay L. Roth & Associates, Inc.
Schwartz Consulting Partners

CORPORATE SPONSORSHIP
Performance Research

CUSTOMER SATISFACTION
BAIGlobal Inc.
Elrick and Lavidge
Holleran Consulting
Low + Associates, Inc.
Markinetics, Inc.
QS&A Research & Strategy
SuperDatos de México

DIRECT MARKETING
BAIGlobal Inc.
Creative Focus, Inc.
Greenleaf Associates, Inc.
MindSearch
Perception Research Services, Inc.

DISCRETE CHOICE/ CONJOINT
Yarnell, Inc.

DISTRIBUTION
Burr Research/Reinvention Prevention
GraffWorks Marketing Research

EDUCATION
Cambridge Associates, Ltd.
Greenleaf Associates, Inc.
Just The Facts, Inc.
Marketing Advantage Rsch. Cnslts.
WB&A, Inc.

ETHNOGRAPHIC RESEARCH
Alexander + Parker
Asian Marketing Communication Research
Hispanic Marketing Communication Research

EXECUTIVES
BAIGlobal Inc.
C&R Research Services, Inc.
Decision Drivers
Dolobowsky Qual. Svcs., Inc.
Fader & Associates
First Market Research Corp. (Heiman)
Kiyomura-Ishimoto Associates
Marketing Advantage Rsch. Cnslts.
Jay L. Roth & Associates, Inc.
Rothenberg Consulting Group
Paul Schneller - Qualitative
Strategy Research Corporation

FINANCIAL SERVICES
Jeff Anderson Mktg. Rsch. Consulting
BAIGlobal Inc.
Burr Research/Reinvention Prevention
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Cambridge Research, Inc.
Dolobowsky Qual. Svcs., Inc.
Elrick and Lavidge
Fader & Associates
Lieberman Research Worldwide
Low + Associates, Inc.
Marketing Matrix, Inc.
Matrixx Marketing-Research Div.
MCC Qualitative Consulting
Jay L. Roth & Associates, Inc.
WB&A, Inc.

FOOD PRODUCTS/ NUTRITION
Alexander + Parker
BAIGlobal Inc.
C&R Research Services, Inc.
Greenleaf Associates, Inc.
Holleran Consulting
Just The Facts, Inc.
Macro International
Outsmart Marketing
Jay L. Roth & Associates, Inc.
Rothenberg Consulting Group
Paul Schneller - Qualitative

FOOTWEAR
Best Practices Research

GENERATION X
Primary Insights, Inc.

HEALTH & BEAUTY PRODUCTS
Advanced Insights
BAIGlobal Inc.
Suzanne Higgins Associates
Paul Schneller - Qualitative
Thorne Creative Research

HEALTH CARE
Alexander + Parker
Jeff Anderson Mktg. Rsch. Consulting
Chalfont Healthcare Research, Inc.
Directions Data Research
Dolobowsky Qual. Svces., Inc.
The Dominion Group Mktg. Rsch.
D/R/S HealthCare Consultants
Elrick and Lavidge
Erlich Transcultural Consultants
First Market Research Corp. (Reynolds)
Holleran Consulting
I+G Medical Research International
Irvine Consulting, Inc.
Knowledge Systems & Research, Inc.
Lieberman Research Worldwide
Low + Associates, Inc.
Macro International
Market Navigation, Inc.
Matrixx Marketing-Research Div.
MedProbe™ Inc.
The Mercury Group, Inc.
The Research Edge
Rothenberg Consulting Group
Spiller Research Group, Inc.
Strategy Research Corporation
Widener-Burrows & Associates, Inc.

HISPANIC
Behavior Research Center, Inc.
Data & Management Counsel, Inc.
Erlich Transcultural Consultants
Findings International Corporation
Hispanic Marketing Communication Research
Lieberman Research Worldwide
Mari Hispanic Field Services
Francesca Moscatelli
Strategy Research Corporation
Target Market Research Group, Inc.

HIGH-TECH
Asian Marketing Communication Research
Hispanic Marketing Communication Research
Market Connections, Inc.
Market Navigation, Inc.
Research Connections, Inc.
Perception Research Services, Inc.
Thorne Creative Research

HOUSEHOLD PRODUCTS/CHORES
Paul Schneller - Qualitative

HUMAN RESOURCES ORGANIZATIONAL DEV.
Primary Insights, Inc.

IDEA GENERATION
Analysis Research Ltd.
BAIGlobal Inc.
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Creative Focus, Inc.
Dolobowsky Qual. Svcs., Inc.
Doyle Research Associates
Elrick and Lavidge
Just The Facts, Inc.
Matrixx Marketing-Research Div.
Primary Insights, Inc.

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
Erlich Transcultural Consultants
Low + Associates, Inc.

INTERACTIVE PROD./ SERVICES/RETAILING
Research Connections, Inc.

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

Moderator MarketPlace™

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

MEDICAL PROFESSION
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.

NEW PRODUCT DEV.
Jeff Anderson Mktg. Rsch. Consulting
BAIGlobal Inc.
Milton I. Brand Marketing
  Consultant
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Daniel Associates
Data & Management Counsel, Inc.
Dolobowsky Qual. Svcs., Inc.
Doyle Research Associates
Elrick and Lavidge
Fader & Associates
First Market Research Corp. (Heiman)
Greenleaf Associates, Inc.
Just The Facts, Inc.
Lieberman Research Worldwide
Marketeam Associates
Marketing Advantage Rsch. Cnslts.
Outsmart Marketing
Primary Insights, Inc.
Jay L. Roth & Associates, Inc.
Paul Schneller - Qualitative

NON-PROFIT
Cultural Insights, Inc.
Doyle Research Associates
Strategic Focus, Inc.

OBSERVATIONAL
Alexander + Parker
Doyle Research Associates

ON-LINE FOCUS GROUPS
Research Connections, Inc.
Thorne Creative Research

PACKAGED GOODS
Advanced Insights
BAIGlobal Inc.
C&R Research Services, Inc.
Doyle Research Associates
Suzanne Higgins Associates
Just The Facts, Inc.
Jay L. Roth & Associates, Inc.
Thorne Creative Research

PACKAGE DESIGN RESEARCH
Image Engineering, Inc.
Perception Research Services, Inc.
Treistman & Stark Marketing, Inc.

PANELS
Greenleaf Associates, Inc.

PARENTS
Fader & Associates

PET PRODUCTS
Cambridge Research, Inc.
Doane Marketing Research, Inc.
Primary Insights, Inc.

PHARMACEUTICALS
BAIGlobal Inc.
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Chalfont Healthcare Research, Inc.
The Dominion Group Mktg. Rsch.
D/R/S HealthCare Consultants
I+G Medical Research International
Irvine Consulting, Inc.
Macro International
Market Navigation, Inc.
MCC Qualitative Consulting
MedProbe™ Inc.
QS&A Research & Strategy
Paul Schneller - Qualitative
Spiller Research Group, Inc.

POLITICAL/SOCIAL RESEARCH
Cambridge Associates, Ltd.
Cultural Insights, Inc.
Kiyomura-Ishimoto Associates
Francesca Moscatelli

POINT-OF-SALE MKTG.
Perception Research Services, Inc.

POSITIONING RESEARCH
Paul Schneller - Qualitative

PUBLIC POLICY RSCH.
Cambridge Associates, Ltd.
JRH Marketing Services, Inc.
Kiyomura-Ishimoto Associates

PUBLISHING
Cambridge Associates, Ltd.
First Market Research Corp. (Heiman)
Greenleaf Associates, Inc.
Langer Associates, Inc.
Lieberman Research Worldwide
Market Connections, Inc.
Marketing Advantage Rsch. Cnslts.
James Spanier Associates

RETAIL
First Market Research Corp. (Reynolds)
Pat Henry Market Research, Inc.
Knowledge Systems & Research, Inc.
Lieberman Research Worldwide
Market Directions, Inc.
MCC Qualitative Consulting
Rothenberg Consulting Group

SENIORS
Creative Focus, Inc.
Fader & Associates
Suzanne Higgins Associates
Primary Insights, Inc.

SERVICES
The Research Edge

SMALL BUSINESS/ ENTREPRENEURS
Linda Fitzpatrick Rsch. Svcs. Corp.
Kiyomura-Ishimoto Associates
MindSearch
Strategy Research Corporation
Yarnell, Inc.

SOFT DRINKS, BEER, WINE
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Grieco Research Group, Inc.
Jay L. Roth & Associates, Inc.
Strategy Research Corporation

SPORTS
Automotive Insights/Sports Insight
Performance Research

STRATEGY DEVELOPMENT
Paul Schneller - Qualitative

TEACHERS
Greenleaf Associates, Inc.

TEENAGERS
C&R Research Services, Inc.
Doyle Research Associates
Fader & Associates
Matrixx Marketing-Research Div.
MCC Qualitative Consulting
Thorne Creative Research

TELECOMMUNICATIONS
BAIGlobal Inc.
Creative Focus, Inc.
Daniel Associates
Elrick and Lavidge
Erlich Transcultural Consultants
First Market Research Corp. (Heiman)
Hispanic Marketing
  Communication Research
Knowledge Systems & Research, Inc.
Linda Fitzpatrick Rsch. Svcs. Corp.
Horowitz Associates, Inc.
Market Connections, Inc.
Marketing Advantage Rsch. Cnslts.
MCC Qualitative Consulting
Jay L. Roth & Associates, Inc.
Strategy Research Corporation

TELECONFERENCING
Cambridge Research, Inc.

TELEPHONE FOCUS GROUPS
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Doane Marketing Research, Inc.
Doyle Research Associates
Market Navigation, Inc.
MedProbe, Inc.

TOURISM/HOSPITALITY
QS&A Research & Strategy
Rothenberg Consulting Group
Schwartz Consulting Partners

TOYS/GAMES
Fader & Associates
Greenleaf Associates, Inc.

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

TRAVEL
Cambridge Associates, Ltd.
Greenleaf Associates, Inc.
Rothenberg Consulting Group
James Spanier Associates

UTILITIES
Cambridge Associates, Ltd.
Knowledge Systems & Research, Inc.

VIDEO CONFERENCING
Schwartz Consulting Partners

VETERINARY MEDICINE
Doane Marketing Research, Inc.

WEALTHY
Strategy Research Corporation

YOUTH
Fader & Associates
Macro International

Research Industry News

continued from p. 14

$1,060,419, or diluted earnings per share of $.08, on revenues of $19,695,071 as compared to net income of $760,040, or diluted earnings per share of $.07, on revenues of $16,991,111 for the corresponding six-month period of Fiscal 1998. This represents a 40 percent growth in net income and a 16 percent growth in revenues over the same six-month period of the prior year.

Publications Resource Group, Inc., North Adams, Mass., has received $500,000 in an initial round of venture capital funding from Berkshires Capital Investors (BCI) to fund the future growth of the company. PRG is a retailer of business information, with more than 3,000 market research reports and industry newsletters available at www.prgguide.com and through the PRG Guide catalog. The funding will be used to add additional publishers to the 180 which now make up the PRG library, as well as enhance PRG's marketing efforts.

Delaware Research Co., Wilmington, Del., has a new e-mail address (DeSearch@nettaxi.com) and a new Web address (www.concentric.net/~scraps13/del.htm).

Polaris Marketing Research, Atlanta, has installed an automated interactive voice response system and an Internet survey system. In addition, the firm has upgraded its CATI hardware and software.

SPSS Inc., Chicago, has announced its development plans for Clementine, the flagship data mining product of recently acquired Integral Solutions Ltd. Upcoming releases in the Clementine product line will add the ability to work effectively with larger databases in a client/server environment; the ability to export models that include related data management functions as well as calculations and predictions; and additions to the statistical capabilities of Clementine via both the addition of algorithms and tighter integration with SPSS. "Clementine plays a key role in our future plans," says SPSS president and CEO Jack Noonan. "We see Clementine as a rapid analysis environment — a 'workbench' for people to create models that deliver on the promise of data mining. With these plans, we expect Clementine's unique and highly visual user interface and underlying architecture will become an interactive front-end to an increasingly rich set of analytical methods. In addition, improvements to scalability mean that customers will be able to work even more effectively with the very large data volumes in today's data warehouses. Lastly we plan to provide both enhanced and new deployment vehicles which will give users greater ability to deploy the models they develop to transform their organizations."

MasterCard, Purchase, N.Y., has launched a new company, **Transactional Data Solutions** (TDS), which will provide aggregate and other non-consumer specific marketing information from anonymous card transactions for use by merchants in better managing their businesses. This "benign" use of transactional data can help a merchant measure performance, plan marketing, conduct mass media advertising and better understand customers by using focused demographics. Rather than using individual name and address information, the new discipline of transactional research collects anonymous information from previously conducted transactions to aggregate buying behaviors based on demographic, lifestyle, and media preferences. TDS' first information product, Merchant Advisor, uses data that does not connect cardholder names, addresses, phone numbers or e-mail addresses to any transactions. Merchant Advisor will be available in the first quarter of 1999. TDS is a joint venture of MasterCard International and Symmetrical Resources Inc., Deerfield Beach, Fla. For more information visit www.tds-mastercard.com.

A Lot Of Things Got Started On This Davenport...

...including Pat Henry Market Research Inc., the most rec-ognized name in quality marketing reseach. Now in our third generation, we still do business based on Pat's principles of honesty, integrity, innovation and enthusiasm for the people and projects we represent.
We can help you get inside the heads of your target market with our knowledgeable, experienced in-house staff of both qualitative and quantitive researchers. Our 24-hr. telephone bank, focus group facility with video conferencing, mall intercept and national field force guarantee carefully controlled data every time.

Take a seat yourself. Get comfortable with
Pat Henry's state-of-the-art people,
programs and information.
When it comes to getting results,
we'll flip your lid.
Call us today.

PAT HENRY

Marketing Research
Merchandising • Demonstrations
Tower City Center
230 Huron Road N.W. • Suite 100.45
Cleveland, Ohio 44113
216.621.3831 • 800.229.5260

Classified Ads

Director of Qualitative Institute

Strategic Marketing Corporation is seeking a highly motivated professional to lead and develop its Qualitative Institute. SMC -- one of the largest global custom research firms serving the pharmaceutical industry -- is renowned for its innovative, state-of-the-art methodologies. The Director of the Qualitative Institute will develop and implement new qualitative techniques while overseeing a team of qualitative market research specialists. Other responsibilities will include preparing client proposals, conducting qualitative research projects from conceptualization through reporting results, and assisting SMC staff to improve their qualitative research skills.

Candidates should have a minimum of 8 years of experience in conducting qualitative market research studies (including moderating); an advanced degree; and an understanding of the pharmaceutical industry.

Strategic Marketing Corporation is an international market research consulting firm with offices outside Philadelphia, London, and Beijing. SMC offers a competitive compensation package, professional growth, a pleasant work environment and excellent benefits. Please send resume and cover letter to:

Strategic Marketing Corporation
Human Resource Department
One Belmont Avenue, Suite 802
Bala Cynwyd, PA 19004

THE QUESTION SHOP, inc.

A Marketing Research Firm

Focus Groups and All Types of Surveys

RYAN REASOR
President

2860 N. Santiago Blvd.
Suite 100
Orange, CA 92667
(714) 974-8020
FAX: (714) 974-6968

Meet Survey Pro's IntelliCruncher™

Survey Pro™ is optimized for crunching verbatims, rearranging scale structures, and serious slicing and dicing of respondent segments. As an added bonus, you get a great form designer, flexible data collection, and free tech support! Call (800) 237-4565 or visit www.apian.com.

Apian Software *Practical tools for modern management* 469

Don't pay someone else to collect your market research data!

Process your own market research surveys with Remark Office OMR®, scanning software that's fast, easy, affordable, accurate

Download a **FREE** demo at
www.PrincipiaProducts.com
or call **1-800-858-0860**
for more information

PRINCIPIA® PRODUCTS INC
16 Industrial Blvd., Ste. 102
Paoli, PA 19301
Ph: 610-647-7850
Fax: 610-647-8771

StatPac

Professional's choice for survey & marketing research software. User-friendly, comprehensive & dependable. Best crosstab & banner tables. Easiest to learn. Guaranteed.

www.statpac.com

StatPac Inc. (612) 925-0159
4425 Thomas Ave. S., Mpls. MN 55410

Listing Additions

Please add the following firm to the 1999 Focus Group Facilities Directory:

Essman/Associates, Inc.
100 East Grand Ave., Ste. 330
Des Moines, IA 50309-1800
Ph. 515-282-7145
Fax 515-282-4535
E-mail: mail@eassoc.com
www.eassoc.com
Denise Essman, President
Location: Office building
CR, OR, 1/1, VE
20x17 Obs. Rm. Seats 8
25x19 Obs. Rm. Seats 18

Please add the following firm to the 1999 Data Processing/Statistical Analysis Directory:

Austin Trends
7101 Hwy. 71 W., Ste. 213
Austin, TX 78735
Ph. 512-288-8501
Fax 512-288-8502
E-mail: TJUKAM@smart1.net
Services: CD, DE, DT, SC, SA

Index of Advertisers

ACG Research Solutions ... 60
Ph. 314-726-3403 • Fax 314-726-2503

Affordable Samples, Inc. ... 42
Ph. 800-784-8016 • Fax 203-637-8569

Aim Research ... 71
Ph. 915-591-4777 • Fax 915-595-6305

The Analytical Group, Inc. ... 49
Ph. 800-946-2767 • Fax 312-337-2551

Anderson, Niebuhr & Associates, Inc. ... 31
Ph. 651-486-8712 • Fax 651-486-0536

Bernett Research Services, Inc. ... 5
Ph. 617-746-2600 • Fax 617-746-2709

Gordon S. Black Corporation ... 51
Ph. 716-272-8400 • Fax 716-272-8680

Burke, Inc. ... 45
Ph. 513-576-5700 • Fax 513-576-5777

Burke, Inc.- Training & Development ... 27
Ph. 513-576-5700 • Fax 513-576-5777

The Burke Institute ... Inside Back Cover
Ph. 800-543-8635 • Fax 606-655-6064

C&R Research Services, Inc. ... Back Cover
Ph. 312-828-9200 • Fax 312-527-3113

CfMC, Inc. ... 9
Ph. 415-777-0470 • Fax 415-777-3128

Clearwater Research, Inc. ... 58
Ph. 208-376-3376 • Fax 208-376-2008

Common Knowledge, Inc ... 67
Ph. 800-710-9147 • Fax 972-732-1447

Consumer Opinion Services, Inc. ... 65
Ph. 206-241-6050 • Fax 206-241-5213

Consumer Research Ascts./Superooms ... 61
Ph. 800-800-5055 • Fax 415-392-7141

Data & Management Counsel, Inc. ... 65
Ph. 610-459-4700 • Fax 610-459-4825

Decision Analysts, Inc. ... 39
Ph. 817-640-6166 • Fax 817-640-6567

Dennis And Company Research ... 55
Ph. 770-818-0060 • Fax 770-818-0069

Direct Marketing Service, Inc. ... 44
Ph. 561-997-7270 • Fax 561-997-5844

Directions In Research ... 50
Ph. 800-676-5883 • Fax 619-299-5888

Discovery Research Group ... 60
Ph. 714-261-8353 • Fax 714-852-0110

Elliott Benson ... 30
Ph. 916-325-1670 • Fax 916-498-0394

Erlich Transcultural Consultants ... 11
Ph. 818-226-1333 • Fax 818-226-1338

Field Facts International ... 33
Ph. 508-872-8840 • Fax 508-875-4719

First Market Research Corp. ... 40
Ph. 800-347-7811 • Fax 617-267-9080

Focus Central ... 64
Ph. 212-647-7200 • Fax 212-647-7660

Focus Groups Of Cleveland Survey Ctr. ... 72
Ph. 800-950-9010 • Fax 216-901-8085

Focus Pointe, Inc. ... 53
Ph. 800-220-5088 • Fax 215-561-6525

FocusVision Network, Inc. ... 6-7
Ph. 203-961-1715 • Fax 203-961-0193

Friedman Marketing Services ... 35
Ph. 914-698-9591 • Fax 914-698-2769

Group Dynamics In Focus, Inc. ... 54
Ph. 610-668-8535 • Fax 610-668-2072

GroupNet ... 36
Ph. 800-288-8226 • Fax 561-882-0162

Hagler Bailly Consulting ... 62
Ph. 608-232-2800 • Fax 608-232-2858

Hispanic & Asian Marketing Comm. ... 32
Ph. 650-595-5028 • Fax 650-595-5407

I/H/R Research Group ... 52
Ph. 702-734-0757 • Fax 702-734-6319

ICR Research Group ... 57
Ph. 610-565-9280 • Fax 610-565-2369

Maritz Marketing Research ... 17
Ph. 314-827-1610 • Fax 314-827-8605

Market Facts, Inc. ... 19
Ph. 847-590-7000 • Fax 847-590-7010

Meadowlands Consumer Center ... 59
Ph. 201-865-4900 • Fax 201-865-0408

Mercator Corporation ... 67
Ph. 978-463-4093 • Fax 978-463-9375

MORPACE International, Inc. ... 15
Ph. 248-737-5300 • Fax 248-737-5326

Moskowitz Jacobs, Inc. ... Inside Front Cover
Ph. 914-421-7400 • Fax 914-428-8364

NameQuest, Inc. ... 12
Ph. 602-488-9660 • Fax 602-530-2289

NETWORK ... 70
Ph. 606-431-5431 • Fax 606-431-5838

Opinions Unlimited, Inc. ... 48
Ph. 800-604-4247 • Fax 713-960-1160

Pat Henry Market Research ... 81
Ph. 216-621-3831 • Fax 216-621-8455

PhoneSolutions, LLC. ... 56
Ph. 520-296-1015 • Fax 520-296-3393

Polk Research Sampling ... 13
Ph. 800-635-5522 • Fax 303-298-5489

Precision Research, Inc. ... 26
Ph. 847-390-8666 • Fax 847-390-8885

Pro T S Telephony Systems ... 25
Ph. 800-336-7674 • Fax 215-653-7115

Quality Controlled Services ... 29
Ph. 800-325-3338 • Fax 314-827-3373

Sawtooth Software, Inc. ... 63
Ph. 360-681-2300 • Fax 360-681-2400

Sawtooth Technologies ... 69
Ph. 847-866-0870 • Fax 847-866-0876

Schlesinger Ascts. ... 43
Ph. 732-906-1122 • Fax 732-906-8792

Scientific Telephone Samples ... 41
Ph. 800-944-4787 • Fax 714-241-7910

Sigma Validation ... 37
Ph. 201-886-0550 • Fax 201-886-1413

Sorensen Associates ... 47
Ph. 800-542-4321 • Fax 503-666-5113

Star Data Systems, Inc. ... 72
Ph. 561-842-4000 • Fax 561-842-7280

Survey Sampling ... 14, 46, 68
Ph. 203-255-4200 • Fax 203-254-0372

Survey Service, Inc. ... 85
Ph. 716-876-6450 • Fax 716-876-0430

Venture Data ... 66
Ph. 801-486-4949 • Fax 888-522-5498

WAC Of New York ... 3
Ph. 212-725-8840 • Fax 212-213-9247

Letters

We welcome your letters on articles that appear in QMRR, or any research related topic that's on your mind. When you write, please include your name, job title, company or organization name, address, phone number, and e-mail address. Letters may be edited for clarity or space. Send letters to: Joseph Rydholm, QMRR, P.O. Box 23536, Minneapolis, Minn., 55423. E-mail: joeqmrr@uswest.net. Fax 612-854-8191.

Susie Sangren's Data Use article in the January issue reminds me of little promotion items that some research companies used to mail out in the 1960s, usually in the form of circular slide rules made of cardboard that told you the standard error for a given sample size, or vice versa. From the point of view of Statistics 101, there is nothing wrong with it. From the point of view of practical market research, Statistics 101 is simplistic and often misleading, for two reasons:

The article points out, correctly, that the response rate must be considered when determining sample size; it does not point out that if the response rate is substantially lower than 100 percent, the error computation is relevant to the population actually represented by the respondents, not the population from which the random sample was drawn. The resulting error of non response, which is not addressed by the statistical computation, is usually more important than the random sampling error, and is usually a bias rather than a random plus/minus error.

The second reason is that the standard formulas apply under certain conditions. This fact is evident from Exhibit 1 in the article which purports to show sample sizes needed in order, for example, to have 95 percent confidence that a 5 percent incidence projection has an error range of ±15 percent, which implies the nonsensical possibility of a negative incidence.

Tom Semon
Research Consultant in Marketing
Englewood Cliffs, N.J.

Susie Sangren responds:

Your main concern is about distinguishing reality from technical elegance, whereas my article focused on purely the technical understanding of simple random sampling.

I was aware of the non-response problem, but that is a topic for another article. Instead, I chose to stress in the beginning that ". . . the sample size calculated is the number of completed surveys required to achieve a certain level of confidence and error rate . . ." (p. 18)

Your second concern is about Exhibit 1. Sample sizes calculated for the "yes" proportion estimates below 15 percent (i.e., one is very sure that there is no chance of seeing "yes") are impractical, and should be discarded. I agree with you, especially when the sample sizes are reduced to almost nothing when this occurs. They were there for presentation purposes only.

In regards to the article, "In Pursuit of Software" (February 1999), I was disappointed to see that Mr. Struhl passed over one of the better statistical software packages available: Statview, by SAS Institute. Not only is Statview (www.statview.com) an excellent product produced by one of *Fortune*'s "best companies," but it is also available in true Mac/Power Mac format as well as Windows — unlike many of the other products reviewed.

Additionally, Statview recently received the *Macworld* Editor's Choice Award for "Best Science and Engineering Software" for the second time since 1993. Now, I realize statisticians bristle at the thought of working in the Mac format, but I've used Statview as the preferred stat package in my business since founding it 10 years ago. Combined with Apple's System 8.1, it's proven to be stable, easier to learn (than SPSS which we also own), and integrates well with MS Office 98 and other Mac applications.

I challenge you and Mr. Struhl to broaden your perspective and remember that we're not all PC-based. Nor are we all statisticians solely, though our work forces us to use similar tools.

Gerry Cain
Owner/Consultant, T.I.P. Marketing Research
Instructor, University of Kansas, Lawrence

Joe Rydholm responds:

Gerry, I'm sorry we've given you the impression we're anti-Mac. In fact, we're far from it! Our magazine is compiled and produced using Macs (I'm typing these words on one right now) and I have two Macs at home, so I know what it's like to be a Mac user in a PC world.

I also know Steve Struhl isn't anti-Mac, though, like most people, he works mainly on a PC. Steve very graciously reviews software for us in his spare time (even if it means battling pneumonia, as he did with the February installment!) and he chooses the software he reviews based on its interest and relevance to market researchers, not on its platform.

In closing, while Steve is our resident software reviewer, he doesn't have to be our only one! Statview sounds like a nice program, so if you would like to send in a review of it or another stat program for the Mac, I'd be happy to work with you.

Trade Talk

continued from p. 86

ment to one of the marketing executives and walks away.

After the researcher has gone, one marketer turns to another and laughs. "Isn't that just like a researcher? We're looking for the height and he gives us the length."

Speaking of e-mail, I'd like to encourage and invite you to send me some! My address is joeqmrr@uswest.net. Plaudits and/or brickbats are welcome, as are story ideas, observations, anecdotes, and more "lovely metaphors." (No chain letters, please!)

I've heard the pundits who cry that e-mail will be the death of letter-writing. I'd like to think that it may help the gentle art of correspondence, by making the task simpler and more direct. Rather than having to compose your letter, print it, address an envelope and then stamp and mail it, now you simply open your e-mail program, compose your mail, and send it with the click of a button. And it won't take three or four days for your missive to reach its destination. Three or four seconds is more like it.

Specifically, I'd like to get feedback on the magazine, what you like or don't like, what kinds of stories you'd like to see more or fewer of. Perhaps you've worked on a research project and would like to submit an article about it or have us consider writing something about it . . .

Your input is also sought on some ideas I have for upcoming issues. For example, in our May issue I'm planning to include a few stories about interactive voice response (IVR) research. We've covered the topic in the past but recently we've been receiving more phone calls from readers looking for information about IVR. And I've noticed more research firms promoting their IVR capabilities, so I think some articles are in order. (And May being our telephone interviewing issue seems like the best place to put them.)

Some of the callers have wondered about response rates and other issues surrounding IVR, so I'm planning a kind of "FAQ on IVR" to answer several questions. If you have specific questions on IVR you'd like answered, drop me a line. (If your firm has used IVR for a research project and you think your experience would make a good story in our magazine, let me know!)

Internet/on-line research is another topic that readers always seem to have questions about. Our annual Internet/on-line research issue is coming in July and I'm planning on compiling a buyer's guide to choosing an on-line research supplier (thanks to a visitor to our Researcher Forum on the QMRR Web site [www.quirks.com] for the story idea!). Once again, if there are questions you'd like answered, let me know. My plan is to talk to providers and users of Internet/on-line research and get their tips and suggestions. If you have some thoughts on the matter, I'd love to hear them — by e-mail or snail mail!

January 18, 1992 - A vicious tornado touched down in the Midwest and sucked up a focus group facility located in a trailer park. Sadly enough the moderator, the focus group participants and all of the test product were blown over state lines thus damaging the demographic integrity for this important study.

And You're Afraid Of A Little Snow?

In over 40 years we have never canceled a focus group or pre-recruited study due to snow.

MEASURING CONSUMER PREFERENCES

Survey Service, Inc.

1911 Sheridan Drive, Buffalo, New York 14223

For a bid on your next project call...

800.507.7969

Visit our web site at surveyservice.com

Trade Talk

By Joseph Rydholm, QMRR editor

Start those letters coming

My subject this month is electronic correspondence. First off, taking a cue from War Stories compiler Art Shulman, here are two bits of research-related wit e-mailed to us by reader Jerry Travis.

Travis labeled the first one, supplied to him by a friend, "a lovely metaphor."

A man was floating in a hot air balloon and suddenly realized he was lost. He began reducing his height and soon spotted a man down below. He lowered the balloon further.

"Excuse me," he shouted, "can you tell me where I am?"

"Yes, you're in a hot air balloon, hovering 30 feet above the ground," the man on the ground said.

"You must work in marketing research," said the balloonist.

"As a matter of fact I do," replied the man. "How did you know?"

"Well," said the balloonist, "everything you have told me is technically correct, but it's of no use to anyone."

The man below thought for a moment and then said, "You must work in marketing."

"I do," replied the balloonist. "How did you know?"

"Well," began the marketing researcher, "you don't know where you are or where you're going, but you expect me to be able to help. You're in the same position you were before we met, but now it's my fault."

Travis also sent us this tale:

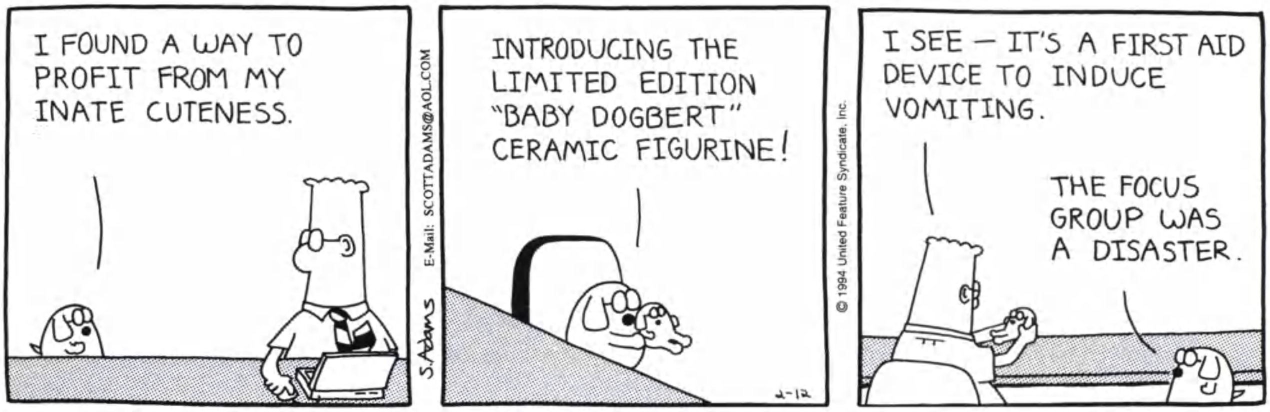
A group of marketing executives were given the assignment to measure the height of a flagpole. So they go out to the flagpole with ladders and tape measures, and they're falling off the ladders, dropping the tape measures — the whole thing is just a mess.

A market researcher comes along and, seeing what they're trying to do, walks over, pulls the flagpole out of the ground, lays it flat, measures it from end to end, gives the measure-

continued on p. 85

Dilbert

Reprinted by permission of United Feature Syndicate, Inc.


I FOUND A WAY TO PROFIT FROM MY INATE CUTENESS.
E-Mail: SCOTTADAMS@AOL.COM
S. Adams
INTRODUCING THE LIMITED EDITION "BABY DOGBERT" CERAMIC FIGURINE!
2-12
© 1994 United Feature Syndicate, Inc.
I SEE — IT'S A FIRST AID DEVICE TO INDUCE VOMITING.
THE FOCUS GROUP WAS A DISASTER.

EXCELLENCE

Is Part Of What We're Instituting.

We cordially invite you to experience our commitment to Excellence, while learning marketing research methods and applications from the **most experienced marketing research training organization in the world!**

Participate in a **Burke Institute** seminar and you will experience our unconditional commitment to excellence. From the intensive, on-target seminar content to the workbooks which rival the best reference sources. From our dedicated staff who will counsel you concerning the best training programs (ours or others) to our outstanding seminar leaders who will educate you in the best practices utilized by marketing researchers worldwide.

Through over **2,500 seminars on 25 topics with more than 50,000 participants in 28 countries,** we have demonstrated our single-minded dedication to excellence for more than 20 years. The exceptionally high rate of repeat participation in our seminars by past attendees is testament to our commitment to excellence.

But excellence is not the only benefit you get when you attend our seminars. Here are a few more:

OBJECTIVITY. You receive a full and impartial perspective on the best research methods used by state-of-the-art practitioners and research suppliers worldwide. Not just the proprietary techniques and viewpoints of a particular supplier.

INTEGRITY. Our mission is education. Participants from our seminars are never contacted for anything other than follow-up related to their continuing education. Guaranteed unconditionally.

EXPERTISE. You learn from the experts who "wrote the book" on marketing research training and have educated more practitioners than anyone else in the world.

BREADTH. You get to select from a wide range of programs designed to meet your continuing educational needs. Our programmed sequence of seminars eliminates the duplication and conflicting content which often results from attending disjointed seminars from different sources.

RECOGNITION. You get tangible professional recognition for attendance through our highly respected certificates of proficiency.

REALISM. Our seminars combine academic rigor with real-life expertise gained from having done tens of thousands of research studies. The content is usable immediately in day-to-day work.

These are just some of the many reasons for the superlative evaluations we receive from our participants:

> Fantastic - the best seminar on any subject I've been to. Right on target - will be a help immediately. Speaker superb. A born teacher.
>
> Marketing Research Analyst, **Ford Motor Co.**
>
> Excellent! Best professional seminar I've been to. Content was practically oriented. Speaker excellent! Presented information in an extremely "user friendly" manner. Energy level was phenomenal.
>
> Manager, Marketing Research, **Bausch & Lomb**
>
> The best money I've spent all year! Content great - answered all my questions. I'm sure I will refer to (workbook) almost daily.
>
> Manager Research, **US Sprint**

The Burke Institute

Schedule of Seminars Through December 1999

101. Practical Marketing Research
New York ..... Jan. 4-6
Cincinnati ..... Feb. 8-10
Dallas .... Mar. 1-3
Atlanta .... Mar. 22-24
Chicago ...... Apr. 19-21
San Francisco .. May 17-19
Toronto .... June 7-9
Miami .... July 7-9
Cincinnati ... Aug. 2-4
Minneapolis .. Aug 16-18
New York ... Aug. 30-Sept. 1
Chicago ..... Sept. 27-29
Seattle .... Oct. 25-27
San Diego ... Nov. 15-17
New York ... Dec. 13-15

103. Marketing Research for Decision Makers
Chicago ...... Apr. 22-23
Cincinnati ... Oct. 4-5

104. Questionnaire Construction Workshop
New York ..... Jan. 11-13
Cincinnati ..... Feb. 15-17
Chicago ...... Mar. 29-31
Atlanta .... Apr. 26-28
Seattle .... May 24-26
New York ... July 12-14
Cincinnati ... Aug. 9-11
Boston ...... Sept. 13-15
Miami ...... Oct. 18-20
San Francisco Dec. 6-8

105. Questionnaire Design
New York ..... Jan. 14-15
Cincinnati ..... Feb. 18-19
Chicago ...... Apr. 1-2
Seattle .... May 27-28
New York ... July 15-16
Cincinnati ... Aug. 12-13
Miami ...... Oct. 21-22
San Francisco Dec. 9-10

201. Focus Groups: An Introduction
Chicago ...... May 4-5
New York ... Sept. 8-9

202. Focus Group Moderator Training
Cincinnati ..... Jan. 19-22
Cincinnati ..... Feb. 23-26
Cincinnati ..... Apr. 13-16
Cincinnati ..... May 18-21
Cincinnati ..... June 22-25
Cincinnati ... July 20-23
Cincinnati ... Aug. 24-27
Cincinnati ... Sept. 21-24
Cincinnati ... Nov. 2-5
Cincinnati ... Dec. 14-17

203. Focus Group Applications
Cincinnati ..... Apr. 19-21
Cincinnati ..... July 26-28
Cincinnati ... Nov. 8-10

204. Qualitative Research Reports
Cincinnati ..... Apr. 22-23
Cincinnati ..... July 29-30
Cincinnati ... Nov. 11-12

New **205. Qualitative Research with Children**
Chicago ...... May 6
New York ... Sept. 10

New **206. Interviewing Executives & Professionals**
Cincinnati ..... Mar. 11
Chicago ...... July 15
New York ... Sept. 30

301. Communicating Marketing Research
New York ..... Jan. 20-22
Cincinnati ..... Mar. 1-3
Dallas .... Apr. 6-8
Boston .... May 10-12
San Francisco July 6-8
Cincinnati ... Aug. 23-25
Chicago ..... Oct. 6-8
New York ... Nov. 29-Dec. 1

401. Managing Marketing Research
Cincinnati ..... Mar. 4-5
Boston .... May 13-14
Cincinnati ... Aug. 26-27
New York ... Dec. 2-3

501. Applications of Marketing Research
New York ..... Jan 7-8
Cincinnati ..... Feb. 11-12
Atlanta .... Mar. 25-26
San Francisco .. May 20-21
Cincinnati ... Aug. 5-6
Chicago ..... Sept. 30-Oct. 1
San Diego ... Nov. 18-19

502. Product Research
New York ..... Feb. 16-17
Chicago ...... June 3-4
New York ... Sept. 2-3
Cincinnati ... Nov. 22-23

504. Advertising Research
New York ..... Mar. 11-12
Chicago ...... May 27-28
San Diego ... Aug. 12-13
Cincinnati ... Nov. 11-12

505. Market Segmentation Research
New York ..... Mar. 9-10
Chicago ...... May 25-26
San Diego ... Aug. 10-11
Cincinnati ... Nov. 9-10

506. Customer Satisfaction Research
New York ..... Mar. 16-17
Chicago ...... June 8-9
Cincinnati ... Sept. 14-15
Atlanta ...... Dec. 6-7

New **507 Analysis and Interpretation of Customer Satisfaction Data**
New York ..... Mar. 18-19
Chicago ...... June 10-11
Cincinnati ... Sept. 16-17
Atlanta ...... Dec. 8-9

601. Translating Data into Actionable Information
New York ..... Jan. 18-19
Dallas .... Mar. 4-5
Toronto .... June 10-11
Cincinnati ... July 26-27
Chicago ..... Oct. 4-5
New York ... Dec. 16-17

602. Tools and Techniques of Data Analysis
New York ..... Jan. 26-29
Cincinnati ..... Feb. 23-26
Boston .... Mar. 30-Apr. 2
Atlanta .... May 11-14
San Francisco .. June 15-18
New York ... July 20-23
Cincinnati ... Aug. 17-20
Chicago ..... Oct. 12-15
Dallas .... Nov. 15-18

603. Practical Multivariate Analysis
New York ..... Feb. 2-5
Boston .... Apr. 13-16
San Francisco .. June 22-25
Cincinnati ... Aug. 31-Sept. 3
Chicago ..... Oct. 19-22
Atlanta ...... Nov. 30-Dec. 3

New **604. Data Analysis: A Hands-On PC Based Workshop**
Cincinnati ..... Feb. 8-10
Cincinnati ..... Apr. 26-28
Cincinnati ... July 28-30
Cincinnati ... Oct. 25-27

701. International Marketing Research
New York ..... Feb. 18-19
Chicago ...... June 28-29
Miami ...... Nov. 4-5

702. Business to Business Marketing Research
Cincinnati ..... Mar. 8-10
Chicago ...... July 12-14
New York ... Sept. 27-29

CERTIFICATE OF PROFICIENCY IN MARKETING RESEARCH METHODOLOGY & APPLICATIONS
Cincinnati .... Feb. 8-Mar. 5
Cincinnati .... Aug. 2-Aug. 27

CERTIFICATE OF PROFICIENCY IN QUALITATIVE RESEARCH
Cincinnati .... Apr. 13-23
Cincinnati .... Nov. 2-12
Cincinnati .... July 20-30

CERTIFICATE OF PROFICIENCY IN QUANTITATIVE ANALYSIS
New York .... Jan. 18-Feb. 5
Chicago .... Oct. 4-22

Certificate seminars may be taken back-to-back during scheduled dates or in various cities over an extended period of time.

All the above Burke Institute seminars are available for in-house presentation.

The
Burke
Institute

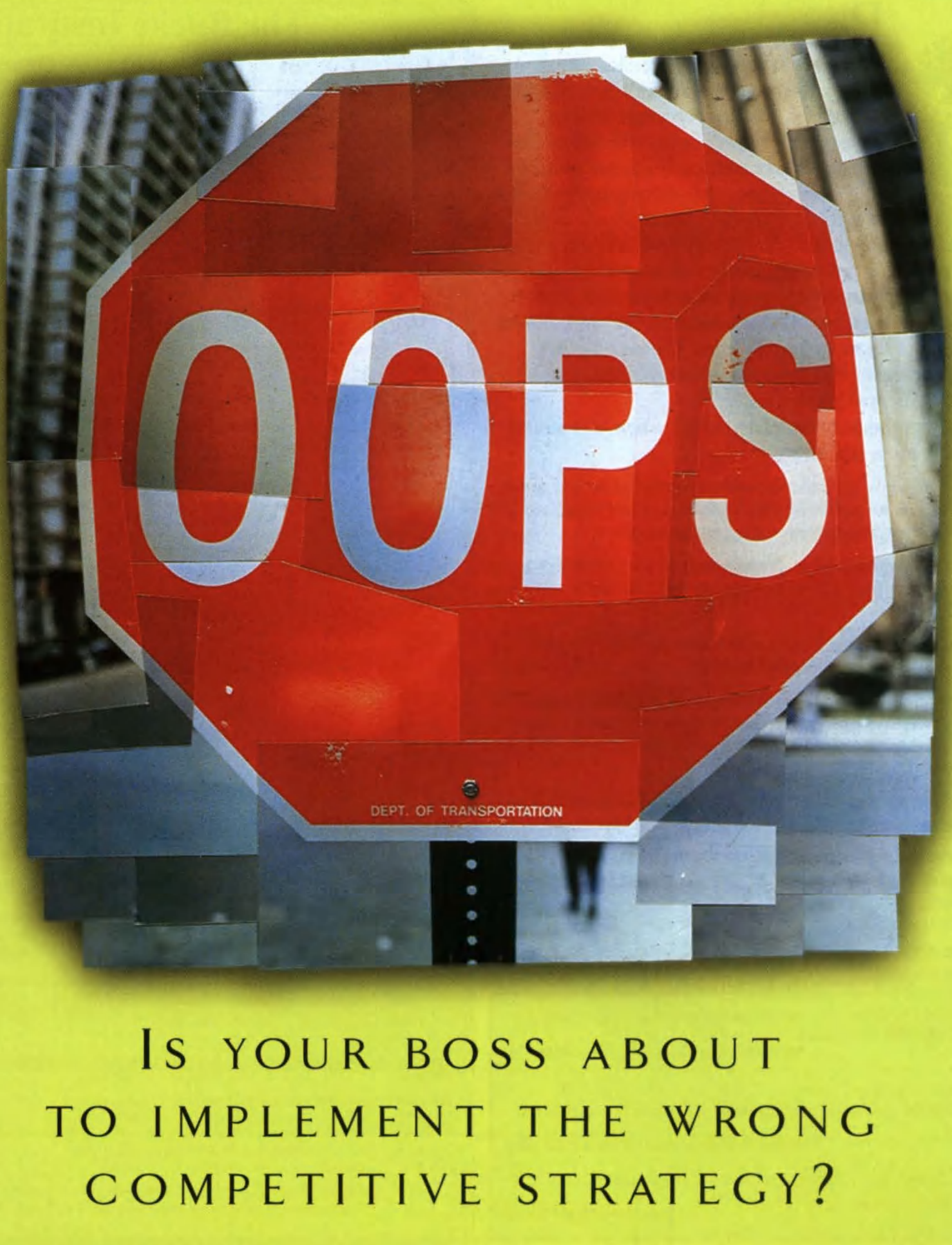
Cincinnati Corporate Headquarters
50 E. RiverCenter Boulevard
Covington, Kentucky 41011
© 1999, The Burke Institute

Please contact:

MR. JIM BERLING, Client Service Manager or
DR. SID VENKATESH, President

Voice: 800-543-8635
606-655-6135
Fax: 606-655-6064
E-mail: BurkeInstitute@BASES.ACNielsen.com

Web Site: http://www.BurkeInstitute.com


OOPS
DEPT. OF TRANSPORTATION

IS YOUR BOSS ABOUT TO IMPLEMENT THE WRONG COMPETITIVE STRATEGY?

C&R RESEARCH SERVICES
FULL-SERVICE MARKETING RESEARCH

C&R RESEARCH

LET'S FIND OUT.

312-828-9200 • (fax) 312-527-3113 • www.cr-research.com