



# QIRK'S

Marketing Research Review

Volume XIII, Number 6

June 1999

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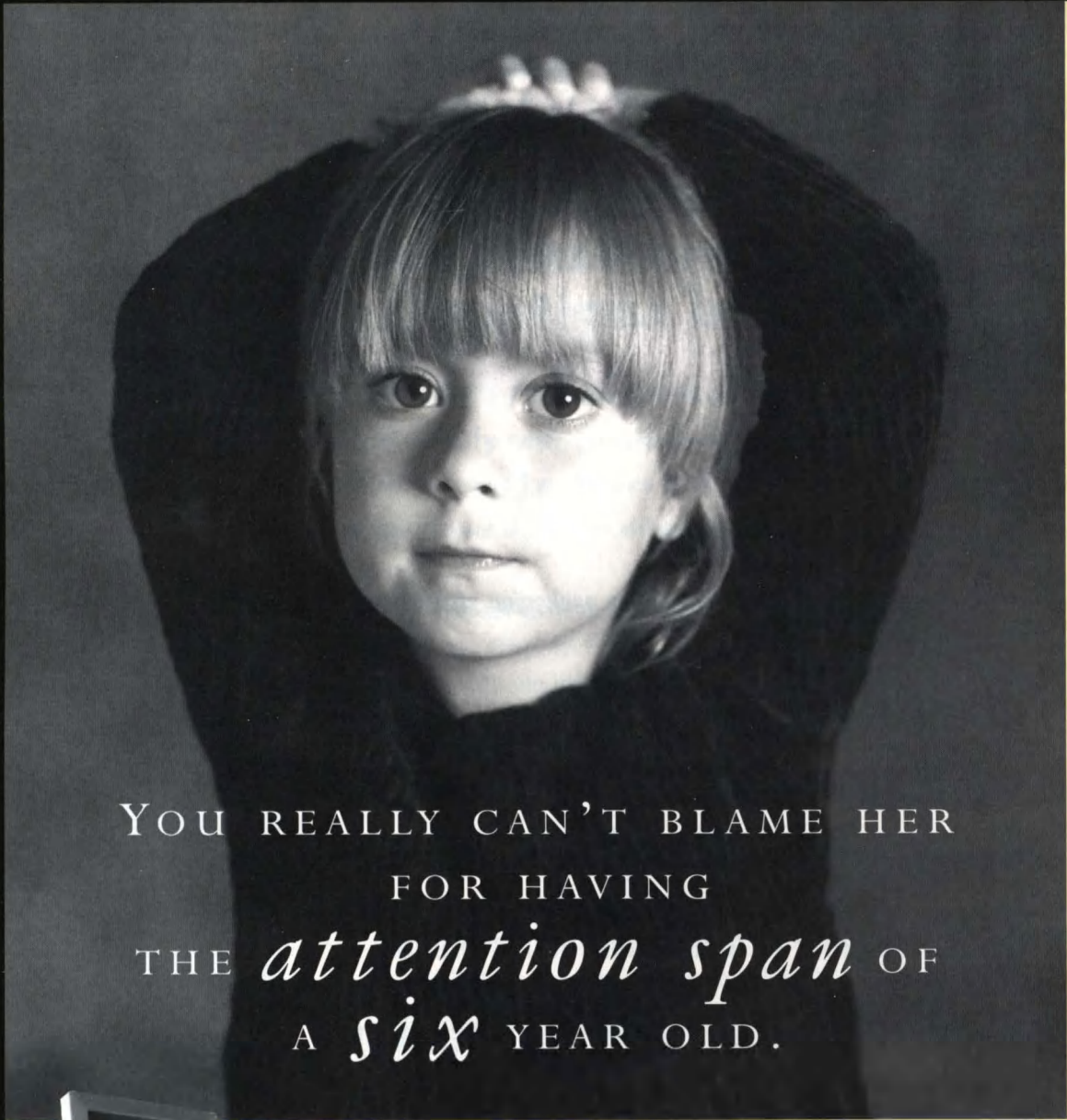
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# QUIRK'S

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## Use of frequent-shopper programs keeps growing

A study conducted by ACNielsen U.S., a Schaumburg, Ill., operating unit of ACNielsen Corporation, found that participation in grocery store frequent-shopper programs has grown to 66 percent of U.S. households — up from 55 percent in 1997 and 35 percent in 1996. For the most part, the dramatic increase can be attributed to the growing number of retailers who are introducing such programs.

The fact that more retailers are offering such programs is no surprise, says Robert Tomei, ACNielsen senior vice president of marketing. “There is a significant incentive for retailers to offer frequent-shopper programs because program members tend to spend significantly more per shopping trip than non-members,” he says.

The amount program members spend per shopping trip compared with non-members varies by retailer. However, program members have

been found to spend as much as two to three times more per shopping trip than non-members. A geographic analysis of household participation shows significant differences across the country. The top five markets are Chicago, where 97 percent of households participate in at least one frequent-shopper program, Phoenix (95 percent), Los Angeles (93 percent), Denver (92 percent) and Charlotte (91 percent). The bottom five markets are Houston (52 percent), San Antonio (18 percent), Columbus (17 percent), Miami (10 percent) and St. Louis (10 percent).

The study also looked at the role that frequent-shopper programs have on consumers’ decisions about where to shop. While the convenience of a store’s location and store deals were ranked first and second, the fact that their store of choice offers a frequent-shopper program ranked third. Next came assortment of merchan-



dise, everyday low prices, quality of merchandise and customer service. It is noteworthy that respondents placed the frequent-shopper program above everyday low prices, Tomei says. “Apparently, people prefer to do something proactive to save money. Handing the cashier a frequent-shopper card feels more tangible than the promise of everyday

low pricing,” he says.

Participating households use their frequent-shopper cards often. In fact, 82 percent said they use a frequent-shopper card every time they buy groceries. Another 12 percent said they use their card most of the time.

From a retailer’s standpoint, the primary goal of a frequent-shopper program is to increase consumer loyalty. However, as more retailers roll out such programs, consumers are spreading their loyalty among several stores. Of households that participate in at least one frequent-shopper program, 57 percent participate in two or more. Seven percent of households participate in four or more programs. “The savviest retailers will evolve their frequent-shopper programs to the next level of category management which will be a more proactive, more personal ‘direct-to-consumer’ marketing approach designed to build the strongest possible relationship with their best customers,” Tomei says.

ACNielsen’s third annual frequent-shopper study included responses from nearly 41,000 households on the company’s Homescan Consumer Panel. For more information visit the company’s Web site at <http://acnielsen.com>.

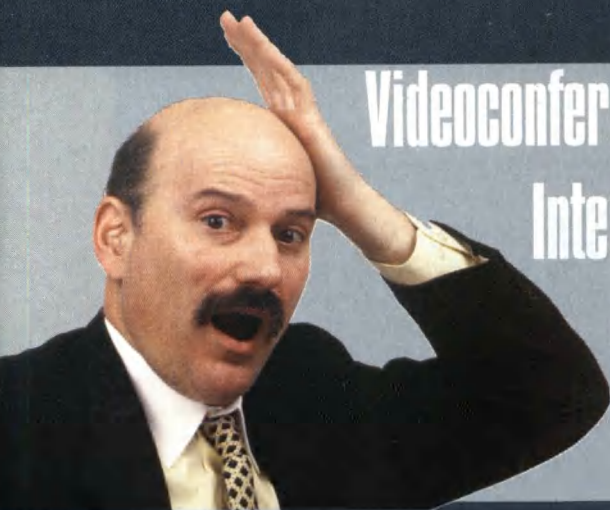
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## Name that sponsor

During the month of March, the Fox Sports/R.O.I Poll asked 1,205 U.S. respondents to name the sponsors of the NCAA Basketball Tournament. Of the more than 80 companies mentioned, Nike, which was not a sponsor, was most often named, at 13.7 percent. Rounding out the top three were such non-sponsors as Coca-Cola (6 percent) and McDonald’s (4.9 percent). In fact, of the top 10 companies named, only Pepsi, at 4.5 percent, was an actual tournament sponsor. College basketball fans (defined as having an interest level of three or more on a five-point scale), as expected, are slightly more in tune with the sponsors. While the list of top 10 companies mentioned did not vary much from the overall list, there were a few notables. For example, roughly 90 percent of the respondents who correctly named American Express and Taco Bell as sponsors were categorized as fans. And while the gap between Coke and Pepsi stood at 1.5 percent among the general population, it was less than half of that when looking at just fans. The poll was conducted by R.O.I Research, New York. For more information call Alicia Rankin at 212-750-5252.



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**Laurie Gooding** has joined *Cahners In-Stat Group*, a Newton, Mass., research firm, as a senior networking WAN analyst in the firm's Voice and Data Communications Group. Gooding will focus on voice over Internet protocol (VoIP) and other technological trends in the wide-area networking industry.

The University of Texas at Arlington is establishing an endowed scholarship fund to create the Philip Barnard Scholarship for students pursuing a master of science in marketing research degree. The fund was established to honor the contributions Barnard has made to the university's graduate research program. Barnard recently retired as executive chairman of the board of the *Kantar Group*, a London-based research

firm. Contribution checks, made payable to the Philip Barnard Scholarship Fund, may be sent to RoseAnn Reddick, Marketing Dept., University of Texas at Arlington, P.O. Box 19469, Arlington, Texas, 76019.



**Barnard**

**Balzano**

**Michael Balzano** has been named national sales manager of *Penton Research Services*, Cleveland.

**Bruce Williamson** has joined

*Taylor Nelson Sofres Telecoms* as worldwide director of product development and methods. He will be based in San Antonio, Texas.

**Howard Shimmel** has been appointed executive vice president - marketing research services for *Symmetrical Resources, Inc.* He has also assumed the role of acting president of *Simmons Market Research Bureau*.

*NETWORK*, a Covington, Ky., research firm, has named **Ann Wilking** account director, **Leigh Ferrell** senior project manager, and **Nan Sempstrott** project associate. In addition, **Cathy Sandlin** has been promoted to technical specialist.

*Opinion Research Corporation*, Princeton, N.J., has promoted members of its management team. **Linda G. Shea** and **James D. Daniels** were elected senior vice presidents and **Robert E. Clark** was elected vice president of the global marketing research and model-based teleservices firm.

*Clearwater Research, Inc.*, Boise, Idaho, has announced several promotions at its Boise office: **Rebecca Needles** to data collection project coordinator; **Julie Rieman** to data collection assistant supervisor; **Brooke Pace** to research analyst; **Margie Olson** to evening/weekend data collection manager; **Mariah Norris** to research analyst; **Eric Holloway** to field services manager; **Scott Banner** to research analyst; **Greg Loveday** to lead programmer. In addition, the following new staff members have joined the firm: **Selina Carver-Shaw**, **Janice Rush**, and **Don Holley** as associate study director; **Mark LaSalle** as human factors research analyst; and

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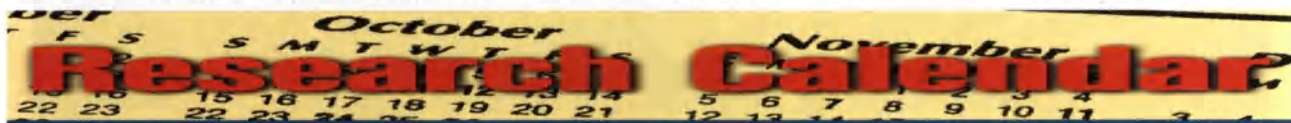
## Microtab offers freeware, new crosstab package

Microtab, Inc., a Roswell, Ga., software and data analysis firm, is offering, as freeware, a new program called Bit-Test. Bit-Test is a utility that reads and translates IBM 360 column binary data files. The program parses the file into card columns (2 bytes or 16 bits per column). The bit value and corresponding IBM 360

column binary punch equivalent(s) are displayed for each column. Users can page through the file to view data for each card within a record, and for each record within the file. The program can be downloaded from the company's Web site at [www.microtab.com](http://www.microtab.com) or obtained by calling 770-552-7856.

The firm has also released updates of its crosstabulation software packages, The Professional Edition and

The Professional Edition with Stat. The programs have been enhanced to include features such as batch deletion of records and automatic weight value calculations for sample balancing. Both Professional Editions now include a routine that automatically calculates RIM weighting (also referred to as sample balancing). After specifying the target weights, the program will automatically calculate individual weight values for



**MRA ANNUAL CONFERENCE:** The Marketing Research Association will hold its 41st annual conference, themed "Framework for the Future," in Boston at the Boston Park Plaza Hotel on June 9-11. For more information call 860-257-4008 or visit the organization's Web site at [www.mra-net.org](http://www.mra-net.org).

**RADIO RESEARCH SYMPOSIUM:** The European Society for Opinion and Marketing Research (ESOMAR) and Advertising Research Foundation (ARF) are co-sponsoring the Radio Research Symposium and Exhibition at the Marriott Long Wharf Hotel in Boston on June 13-15. Scheduled topics include advertising effectiveness, programming research, and a look at how radio measurement is adapting to the changing media environment. For more information, call the ARF at 212-751-5656 or visit its Web site at [www.arfsite.org](http://www.arfsite.org) or visit the ESOMAR Web site at [www.esomar.nl](http://www.esomar.nl).

**PHARMACEUTICAL RESEARCH CONFERENCE AND EXHIBITION:** From June 23-25, the European Society for Opinion and Marketing Research (ESOMAR) and the European Pharmaceutical Marketing Research Organization (EphMRA) are co-sponsoring the Pharmaceutical Marketing Research Conference and Exhibition, themed "Building a Competitive Culture through Shared Responsibility," at the New York Hotel in Marne la Valee (Paris), France. For more information visit the ESOMAR Web site at [www.esomar.nl](http://www.esomar.nl).

**NATIONAL DECISION SYSTEMS CONFERENCE:** San Diego-based National Decision Systems will hold its annual users conference on July 24-28 at Loews Coronado Bay Resort in San Diego. In addition to industry and application-specific breakout sessions, the conference will highlight the company's new products and services. Industry tracks will include retail, restaurant, real estate, non-profit and more. Breakout session topics will range from site selection and merchandising to database marketing and intranet initiatives. For more information contact Melissa Barry at 800-866-6510 ext. 575, or at [melissa.barry@natdecsys.com](mailto:melissa.barry@natdecsys.com).

**ANNUAL ESOMAR CONGRESS:** The European Society for Opinion and Marketing Research (ESOMAR) will stage its 52nd annual Congress and Trade Exhibition from September 5-8 at Le Palais des Congres de Paris, France. For more information visit the ESOMAR Web site at [www.esomar.nl](http://www.esomar.nl).

**BUSINESS GEOGRAPHICS CONFERENCE:** Adams Business Media is sponsoring the eighth annual Business Geographics Conference, themed "Leveraging Spatial Information," at Navy Pier in Chicago from October 4-6. The conference is designed for businesses seeking the latest geographic and demographic data, spatial analysis, and geospatial software tools. For more information call 203-445-9265 or visit the conference Web site at [www.geoplacement.com](http://www.geoplacement.com).

**YOUTH RESEARCH CONFERENCE:** The European Society for Opinion and Marketing Research (ESOMAR) will hold its Worldwide Youth Research Conference, themed "Youth Power: How to Connect?" from October 24-26 at the China World Hotel, Beijing, China. For more information visit the ESOMAR Web site at [www.esomar.nl](http://www.esomar.nl).

**WORLDWIDE QUALITATIVE RESEARCH CONFERENCE:** The European Society for Opinion and Marketing Research (ESOMAR) will hold its Worldwide Qualitative Research Conference from November 28-30 at the Hotel Athenaeum InterContinental, Athens, Greece. For more information visit the ESOMAR Web site at [www.esomar.nl](http://www.esomar.nl).

each record. Eighteen different categories (i.e., age, income) can be weighted and, within each category, 18 unique groupings (18-24, 25-34, etc.) can be examined to develop the weight. The weight values that the computer calculates and assigns on a record by record basis are up to 10 digits in length and the decimal point is fixed at six places from the right.

## Principia debuts Web survey product

Principia Products, Inc., a Paoli, Pa., software firm, has introduced Remark Web Survey, which joins the company's flagship product, Remark Office OMR, to enable users to create and administer interactive forms on the Internet or an intranet. Remark Web Survey was designed to help users create on-line surveys, evaluations, registrations, guest books, etc., for the Internet or for their intranet. The software uses wizards to help the user create and publish their forms, so no

knowledge of HTML is required. Principia also designed Remark Web Survey to work with Remark Office OMR, the forms processing and tabulation software that uses common PC image scanners to collect data. Users can convert paper-based surveys into on-line surveys, and combine the results from both sources. Remark Office OMR then analyzes the data or exports it to virtually any statistics, spreadsheet or database package. For more information call 800-858-0860 or visit the company's Web site at [www.PrincipiaProducts.com](http://www.PrincipiaProducts.com).

## New CS program for college food services

Food Insights, Memphis, Tenn., is now offering an electronic research program to colleges and universities called SatisTrack that can gauge customer satisfaction at college and university food service operations. Participants are recruited on campus through a mystery diner promotion

that offers incentives for feedback on the quality of meals and service at university dining operations via a survey on a special Web site and e-mail system. Since the data is collected electronically, Food Insights can supply a variety of reports almost immediately to the schools' administrative staff or food service operators via e-mail or a secure Web site. The heart of the information generated by SatisTrack is presented in a month-end report provided to clients throughout the academic year. The report provides results in graphical and tabular formats and includes overall satisfaction for each two-week period to-date by each dining facility and overall; individual dining service feature performance scores for each two-week period to-date by each dining facility and overall; monthly gap analysis to-date for the individual dining service features evaluated; institution benchmarking against the industry average; verbatim open-

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**The Marketing Workshop, Inc.**, Norcross, Ga., is now offering ActiveGroup, which allows the firm to broadcast focus groups live via the Internet to clients with a standard Internet connection. For more information call 770-449-6767.

Jesse Yoder has founded **Flow Research**, a market research company focusing on research for flow, temperature, pressure, and level products used in industrial automation and process control flow and related topics, at 27 Water St., Wakefield, Mass., 01880. Phone 781-224-7550. Fax 781-224-7552. Web [www.flowresearch.com](http://www.flowresearch.com). E-mail [info@flowresearch.com](mailto:info@flowresearch.com).

A new interactive research firm, **Catalyst Research Network**, has opened in Seattle. The firm's address is P.O. Box 19599, Seattle, Wash., 98109. Phone 800-918-9301. Fax 206-281-8297. Web site [www.cрни.com](http://www.cрни.com). E-mail [info@cрни.com](mailto:info@cрни.com). For more information contact Evan Reilly.

**IBM** has partnered with **SPSS Inc.** to integrate SPSS data analysis software with the AS/400 platform. This partnership means that customers can use IBM's own data-mining software, Intelligent Miner, along with SPSS software. While SPSS will develop and distribute the products, the companies will work jointly on development and marketing activities. The first phase of the

product will run on the AS/400 using the IPCS card where appropriate. Later phases of the development project will include client/server versions that will be natively supported on the AS/400.

**Hewlett-Packard** has successfully deployed its market research using the MarketView service of Mountain View, Calif.-based **Decisive Technology** as the decision support solution to analyze customers' experiences with HP computing products.

**MRCFocus**, a Las Vegas qualitative research firm, recently opened a new division, On-Site, to meet growing demand for intercept interviews. For more information call Cathy Thomas at 702-734-7511.

**MACRO Consulting, Inc.**, has moved to 1900 Embarcadero Road, Ste. 110, Palo Alto, Calif., 94303. Phone 650-812-7550. Fax 650-812-7551.

**Total Research Corporation**, Princeton, N.J., has created a wholly owned subsidiary, The Idea Farm, Inc., to provide promotional services to agribusiness companies. The new subsidiary will report to Total Research's newly structured Global Life Sciences Division, formerly known as the Global Health Care Division.

Agoura Hills, Calif., research firm **J.D. Power and Associates** has com-

pleted its strategic combination with **Baker & Company**, a Dallas management consulting firm specializing in business-to-business strategy and operations. The firm develops business models and marketing strategies to help clients identify and implement new initiatives for evolving competitive situations. Baker & Company will be operated as a wholly owned division of J.D. Power and Associates. Baker & Company President and Founder Richard Baker will head the new division as a senior partner at J.D. Power and Associates.

**The M/A/R/C Group** reported revenues for the first quarter ended March 31 of \$21,575,000, compared with \$20,399,000 for the same period of 1998. The company recorded net income for the 1999 first quarter of \$253,000, or \$0.05 per share on a diluted basis, compared with a year-ago net loss of (\$729,000), or (\$0.15) per diluted share. Targetbase Marketing had revenues of \$12,935,000 in the first quarter of 1999, a 13 percent increase over last year's first quarter, and generated operating margin of \$798,000, or 6.2 percent. M/A/R/C Research had first quarter 1999 revenues of \$8,634,000, a 3 percent decline from the first quarter of 1998, and had an operating loss of \$367,000. The company also reported that its board of directors has declared a regular quarterly cash dividend of

continued on p. 54

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## Estimating sample size for a descriptive study in quantitative research

By Gang Xu

*Editor's note: Gang Xu is a senior research consultant in statistics at Brintnall & Nicolini, Inc., a Philadelphia, Pa., health care consulting and marketing research firm. He can be reached at 215-854-4200 or at xuga@brintnall.com.*

In quantitative marketing research, we frequently need to calculate the sample size in order to make inferences about the parent population with a given level of confidence. In general, the larger the sample size is, more precise your estimation is. However, more subjects in the study also leads to a higher cost. Therefore, we need to calculate the minimum number of subjects that are required for a study.

In calculating the required sample size, we need to know the characteristic of the variable of interest. Is that a continuous variable (e.g., mean) or a dichotomous variable (e.g., proportion)? In a descriptive quantitative research study, the sample size varies depending on this characteristic of the variable of interest. We'll concentrate on the variable of interest as the focus of our discussion on the following two sections.

### A. Variable of interest is a continuous variable

#### Case study one

*A pharmaceutical company is interested in knowing the average weekly working hours of primary care physicians. You, as a researcher, want to be 95 percent confident that the true population mean of the working hours is within a specified number of units of the estimated mean you calculate from your sample. For instance, after the data is collected from your survey, you find that the average weekly working hours in your sample is 60. You want to be 95 per-*

*cent confident that the population mean is within a 10 unit interval, that is,  $60 \pm 10$ .*

Here, the average working hour is the variable of interest. It is a mean. In estimating the sample size, the variability of the data in the parent population needs to be taken into consideration. Assuming that the distribution of the sample is approximately normal, the following formula can be used to calculate the size of the sample:

$$n = \frac{Z^2 S^2}{d^2}$$

Where:

n is the size of sample;

Z is the z-statistics for the desired level of confidence;

S is the population standard deviation;

d is the half width of the desired interval.

Z is a fixed value set by you, the researcher. When we say "a desired level of confidence," we usually refer to two levels: 95 percent and 99 percent level of confidence. Holding other variables constant, a higher level of confidence (e.g., 99 percent) requires a larger sample size than a lower level of confidence (e.g., 95 percent). For 95 percent confidence level,  $Z = 1.96$  and for 99 percent confidence level,  $Z = 2.58$ . In this example, you have chosen a 95 percent confidence level.

D is also the fixed value at your estimate and choice. In simple terms, d can be thought of as a measure of the precision of sample estimates. A narrow interval (say 55 to 65

continued on p. 52

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***Are consumers receptive to innovative packaging structures?***

By Elliot Young



*Editor's note: Elliot Young is chairman of Perception Research Services, Fort Lee, N.J. He can be reached at 201-346-1600.*

Throughout the world, marketers have come to realize that product success is directly related to consumer receptivity to not only their products but also to their packaging. Effective packaging is crucial in cluttered in-store environments where so many purchasing decisions are made each day.

Shoppers tell us that packaging doesn't influence them, that they don't pay attention to it, and that marketers should spend less money on packaging, and thus lower the product's retail price. However, the reality is that shoppers:

- use shape, color, and type-style to identify a brand;
- formulate opinions of products based on the packaging;
- make decisions in stores, where packaging is the key marketing communicator.

Over the years, trends have developed in the packaging arena, they include:

- a quest by marketers to better understand consumers and their shopping habits;
- globalization — the search for effective communication through common global packaging (a primary example being Coca-Cola's contoured bottle and worldwide graphic presentation);
- improvement in package labeling and the rapid growth of iridescent formats;
- more effective category management systems; systems designed to make the shopping task easier;
- innovations in packaging struc-

tures, specifically, the use of PET plastic bottles.

Innovation in packaging structures offers marketers in virtually all categories a number of valuable competitive advantages, including:

- perceived product uniqueness;
- an ability to differentiate their products from those of private label competitors;
- proprietary ownership of the

vitality important since, in the United States, it is generally acknowledged that in supermarket environments two-thirds of all purchase decisions are made at point-of-sale. In fact, on average, shoppers expect to purchase approximately 10 items when entering a store, and generally walk out having purchased over 19.

Based upon these realities, it is not surprising to see radically new pack-



Beer drinkers who were asked about the *concept* of beer in a plastic bottle (right) had very different opinions from respondents who were actually given the chance to see and touch a bottle and sample its contents.

packaging structure;

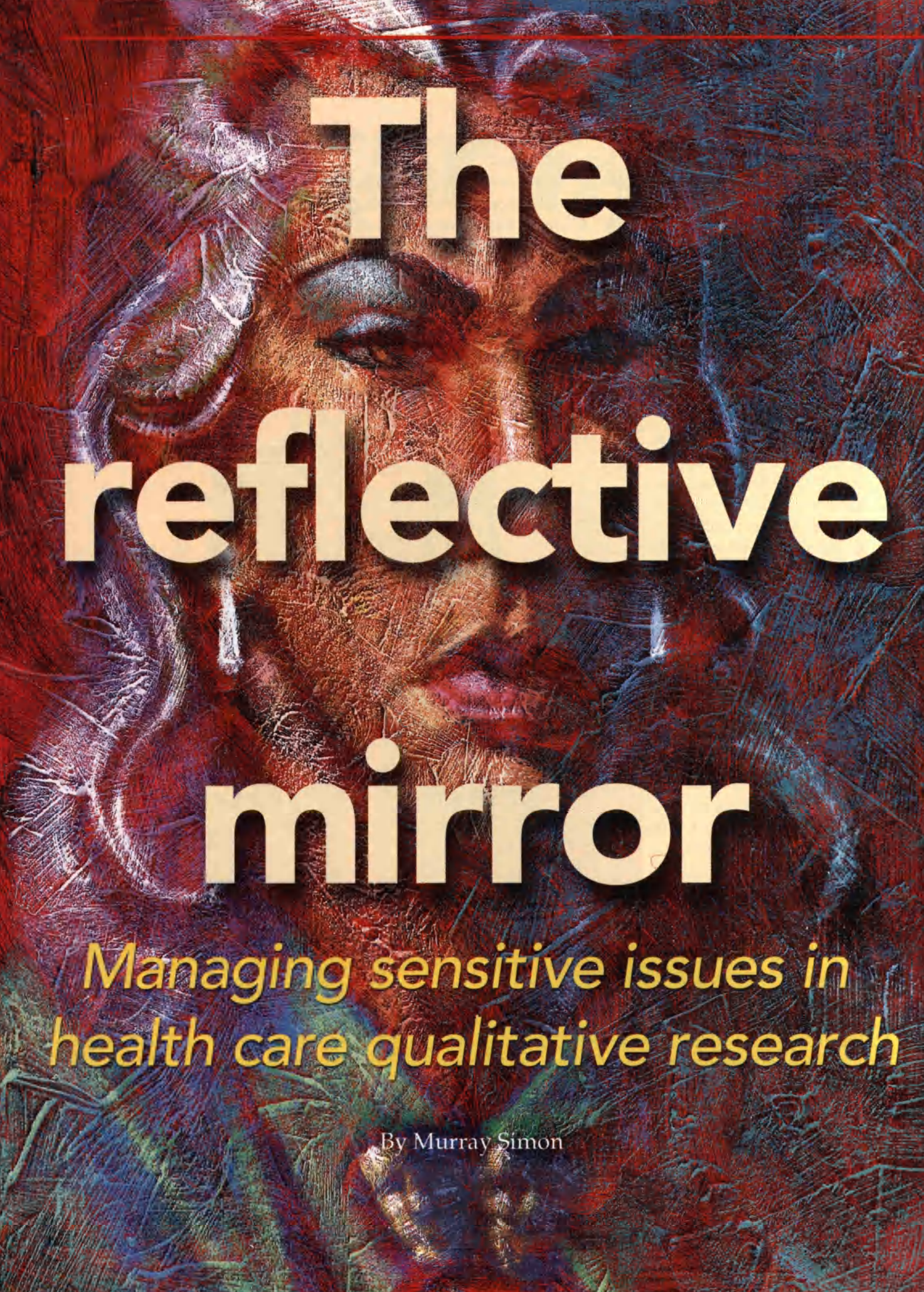
- improved functionality — easier to grip, carry, reseal, etc.;
- improved levels of shelf prominence in competitive clutter, which translates to an improved likelihood of stimulating impulse purchases at point-of-sale.

This shelf prominence issue is

aging structures in virtually all product categories. A few examples include:

- the Log Cabin Syrup package which actually looks like a log cabin;
- the see-through packaging for Colgate Palmolive's Softsoap line;
- the unique plastic packaging for

continued on p. 38



# The reflective mirror

*Managing sensitive issues in  
health care qualitative research*

By Murray Simon

*Editor's note: Dr. Murray Simon is a senior qualitative consultant with The Qualitative Institute, a division of Strategic Marketing Corporation, Bala Cynwyd, Pa. He can be reached at 610-667-1649.*

I doubt that many of you reading the health care research articles in this issue of *Quirk's Marketing Research Review* would argue with the statement that qualitative marketing research in health care is a tough job. It can be stimulating, challenging and very rewarding . . . but it is a tough job!

Qualitative research in other arenas, e.g., computer technology, the Internet, financial services, etc., can be complicated and demanding, but the intricate mosaic of details that comprise the universe of health care marketing research can make heavy demands on those who choose to explore its depths and nuances. Consider the following:

- Membership in health insurance plans is in a constant state of flux. There is a prevailing attitude that suggests that medicine is looked upon as a commodity, with buyers always searching for a better deal.

- If you are interviewing physicians, you are dealing with highly educated/trained/specialized people, some of whom are conflicted with regard to their professional careers — they have lost control of their profession and feel out of sync with their patients.

- The technological changes are astounding and coming at a fast pace — designer drugs, minimally invasive surgery, ultra fast CAT scans, nuclear stress tests.

- The dynamic interaction of the patient/manufacturer/provider trilogy is changing rapidly. One example, direct-to-consumer (DTC) advertising, represents a major variation in the way prescription drugs are marketed. While there may be some question as to whether it is here to stay, it has already had a significant impact and many professionals are having a hard time accepting the consequences.

- Health care is suffering from a case

of public relations trauma — the media is rife with articles relating to the high cost of medicine, complaints about the physician/patient interaction, hospital mergers and acquisitions, patient rights advocacy, etc. Many physicians complain about the frustration of having to deal with managed care's dictates relative to the criteria for their treatment pathways: patients contend that their doctors focus on the disease and ignore the individual.

Which brings us to the subject of this article — managing sensitive personal issues in qualitative health care marketing research. For all its potential complexity, qualitative health care marketing research basically comes down to a dialogue between the moderator and the respondent(s), but experienced moderators know that the scope and intensity of the changes taking place in the health care arena are having a significant impact on emotional levels in the interview process. During a recent telephone interview with a radiation oncologist, I asked a question related to radiation dosages used with particular tumor types. There was a long silence followed by, "Are you sure you're not working for some law firm that's trying to gather standards of care information for a malpractice lawsuit?"

If a qualitative study has a strong emotional component, what are the best ways to make respondents comfortable enough to give the moderator the insights needed? Let's look at some hypothetical, but not improbable, scenarios:

- You have to moderate focus groups that will require your respondents to reveal some very personal details about their lives within a focus group setting. Erectile dysfunction is one potentially embarrassing subject that comes to mind. What can you, as the moderator, do to get these people to share deep-seated thoughts with a room full of strangers, thoughts they perhaps have not even shared with their spouses?

- In conducting physician interviews

or focus groups it is often productive to explore the why-not as well as the why, e.g., how negative clinical outcomes, surgical failures, etc., have influenced their therapeutic rationales. Medical school, however, does not devote a great deal of time teaching its students humility or candor and, with the threat of malpractice litigation always whispering in their ears, it is difficult to get doctors to talk about their failures.

- In focus groups on skin augmentation/enhancement procedures with dermatologists and plastic surgeons (separate groups of course), it is pertinent to find out how each specialty views the other in terms of the competitive professional environment and how they might respond to it (would they expand their range of augmentation procedures, be quick to adopt new therapies, advertise, etc.?). The difficulty is not in getting these doctors to air their concerns, but to get them do it in a reasonably constructive and incisive manner (as opposed to a litany of professional character assassinations).

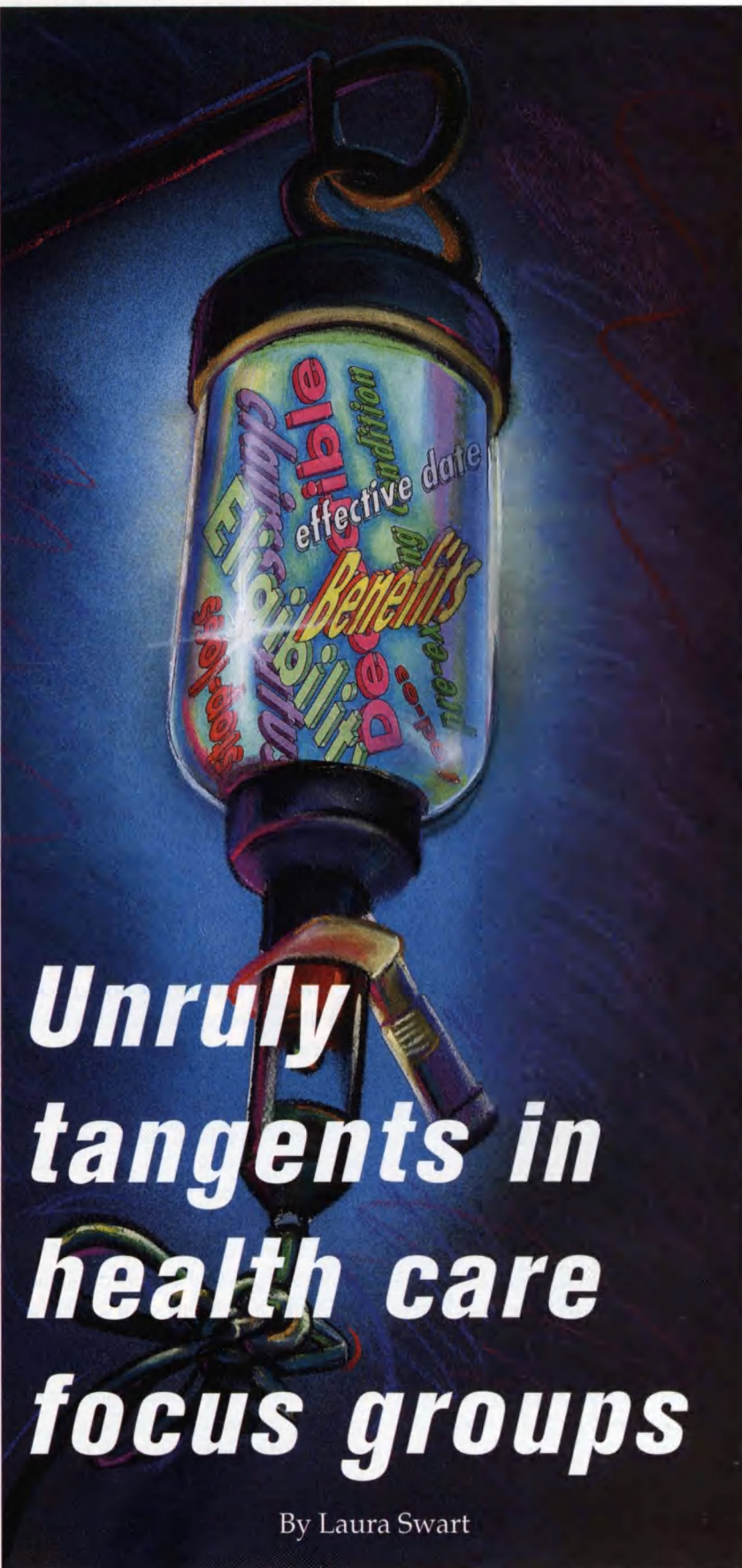
- You are about to conduct interviews with culturally diverse respondents on women's health issues. Are there ethnically related hot buttons you should be aware of before you begin? How will you use them to your advantage? How will you avoid those that should be avoided? Should you prepare separate discussion guides targeted to each audience?

### Can you top this?

An exploration of these issues (and ultimately this article) is an outgrowth of a "can you top this?" luncheon discussion with one of my fellow moderators from The Qualitative Institute. Up until that time I thought I had faced the worst of the worst-case scenarios in terms of dealing with difficult/trying/personally sensitive research moments, but I found myself completely outdone by my colleague.

He had experiences with awkward research situations that made me look like a beginner, and he took great

continued on p. 40



By Laura Swart

*Editor's note: Laura Swart, M.A., is with Chalfont Healthcare Research, Inc., Chalfont, Pa. She can be reached at 215-412-2388.*

**T**here is a familiar tension in health care focus groups. As the client, you need certain topics covered. But as respondents, the physicians or patients have their own agendas. As a result, respondents in health care focus groups tend to focus on their own issues related to health care. This article is about several tangents that arise so often in health care focus groups that they are almost universal.

The good news is that these tangents may be managed if the moderator recognizes them happening and implements the right techniques to refocus the conversation.

The bad news is that, if you purchase health care focus groups, you are very likely to find respondents introducing these tangents. Further, these tangents are emotionally charged, so respondents will derail the conversation from the topic of the research if the tangent is not identified and managed. These tangents arise in health care-related interviews as well as focus groups, but group dynamics can make the tangents more challenging to control in focus groups than in individual interviews.

- **Tangent 1: managed-care bashing.** These days, managed care sparks potentially unruly tangents in most health care focus groups. If allowed, physicians will complain at length about formularies, billing, decreasing autonomy to take care of patients, and alienation from the systems that control physicians' practices. And if allowed, patients will gripe at length about their grievances with insurance coverage and copays.

Regardless of how legitimate these complaints may sometimes be, managed care is typically not a productive topic for lengthy discussion in a focus group. Managed-care reform is usually beyond the research objectives or

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It should be standard procedure for the moderator to explicitly discourage managed-care bashing early and adamantly. After the topic is aired once, the moderator should sympathetically but firmly prohibit repetition, and interrupt as participants attempt further repetition. This interruption should be cordial but assertive.

As a preemptive measure, it helps to indicate, during introductory comments at the start of the focus group, that you will interrupt discussions of managed care and insurance. This early warning prevents respondents from taking umbrage later on when you interrupt their managed-care bashing. It is also helpful, with the client's permission, to state that the client is not an insurer and no insurer will see the research results (when this is the case).

• Tangent 2: unlikely health care reforms. Another class of digressions common in health care focus groups involves decisions that the client

could, but probably will not, change. For example, managed-care pharmacy directors and medical directors cry out for lower drug prices and more favorable contracts with pharmaceutical companies. Physicians object to direct-to-consumer advertising on the grounds that a little information may be dangerous when shared with patients who are unaware of the alternative treatments. Patients opine that medical centers and hospitals should not advertise because they should be altruistic healing enterprises rather than businesses.

If your prices are already fixed, or if you already know that you will advertise, as soon as a participant objects, your moderator should state that the decision is already made and is not a topic of the research.

• Tangent 3: group therapy. Some patients attempt to use focus groups as therapy sessions. They want to unload the emotional baggage that resulted from their illnesses. They want to compare physical symptoms. They

want to commiserate about the emotional upset and inconvenience of being ill, and in some cases they want to complain about the traumas inflicted upon them by health care providers. When these topics are the intended focus of the research, group therapy dynamics may be productive.

However, often these therapeutic topics are not the intended focus of the research. Even when these topics are relevant, the client needs to devise solutions and not just hear problems, so group therapy should be curtailed in favor of a discussion of viable solutions.

With a few limitations noted below, it is legitimate and necessary for the moderator to minimize the time used for therapeutic tangents. After all, the research incentive pays the participant to give the client guidance. Participants have not paid for, and should not expect to receive, therapy during the research.

Generally, when a group takes a therapeutic digression from the

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research objectives, the moderator should acknowledge the point and quickly change the subject before the digression gains momentum. Patients with survivable diseases that do not debilitate them should not expect to indulge in therapeutic tangents for very long.

In research dealing with the more heartbreaking, terminal or debilitating illnesses, there should be limitations to this rule on humanitarian grounds. For example, consider patients stricken with terminal cancer or ALS. These diseases are devastating and can involve intense feelings of victimization associated with a medical system that cannot save patients' and/or cannot offer much relief from symptoms. Expecting these patients to avoid therapeutic tangents would be unrealistic and ruthless. Seriously-ill groups have a more legitimate need to express grief and frustration, and the "minimal therapy" rule should apply more loosely to them than to other groups.

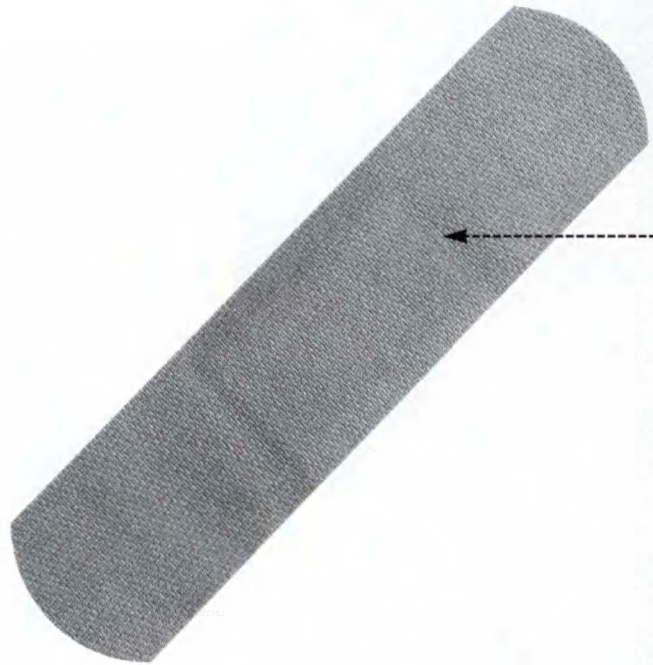
For research with long-suffering patients, if possible the moderator should build in extra time for therapeutic tangents. That way, there is time to cover the research objectives and time for respondents to indulge in a therapeutic discussion.

### **Danger and salvation**

How can tangents be controlled? Unlike breakfast cereal, political elections and many other topics, health care involves danger and salvation, and even matters of life or death. People feel strongly about health care. Knowing this, you may ask whether the type of control discussed in this article can really be achieved.

The answer is that it can be achieved to a large extent by setting the ground rules early and sticking to them, while still maintaining an accepting, relaxed atmosphere so that respondents feel safe sharing their opinions. If your moderator is not experienced with health care, you may wish to alert him or her to expect and control these tangents during your health care focus groups. 

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# Inferring patient loyalty from patient satisfaction data

By David Drachman

*Editor's note: David Drachman is director of marketing research at University HealthSystem Consortium, an Oak Brook, Ill.-based alliance of 80 academic health centers. He can be reached at 630-954-2432 or at drachman@uhc.edu.*

In health care as in other fields, managers have learned that a satisfied customer is not necessarily a loyal customer, and that customer (patient) loyalty is crucial to their organization's bottom line (for example, see MacStrivic, 1991). Although many health care institutions collect ample data on patient satisfaction, specific attempts to measure patient loyalty are less frequently encountered. Furthermore, many health care institu-

tions are reluctant to impose yet another set of survey questions on their patient populations. This article describes an approach for inferring patient loyalty from patient satisfaction data of the sort already collected by many health care organizations.

### **Are loyal patients always satisfied patients?**

There are many dramatic illustrations of the fact that a satisfactory experience with a company doesn't guarantee loyalty to that company (Jones and Sasser, 1995). A highly satisfied customer or patient may nevertheless "defect" to a competitor. Not all satisfied patients are loyal, and from this fact it is easy to assume that satisfaction is a precondition

for loyalty. However, some patients who are very dissatisfied with a specific hospital episode may nevertheless remain loyal to the hospital for a variety of reasons, such as past positive experiences at the hospital, a sense of allegiance to the caregivers that treated them, familiarity, lack of a viable alternative, and so on.

### **Another approach**

Let's look at how we might use this fact to infer loyalty from the standard satisfaction data that many hospitals routinely collect. Data from the University HealthSystem Consortium (UHC) patient satisfaction database will be used to illustrate the approach. This database includes over 11,000 adult inpatient surveys collected from patients of 27 acad-



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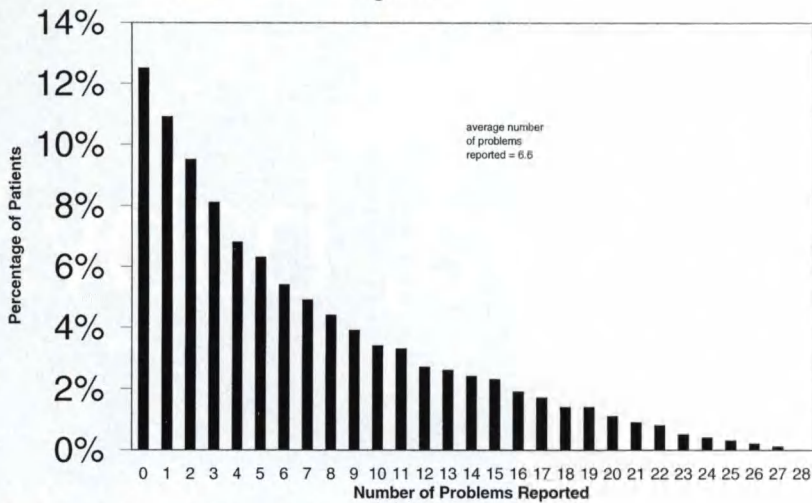
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Figure 1



source: 1998 UHC/Picker Institute adult inpatient satisfaction survey

emic health centers (AHCs) that belong to UHC. The survey instrument we are using is provided by the Boston-based Picker Institute. The majority of the survey questions ask the patients to report on, rather than rate, their experiences with hospital care. For example, one of the questions asks:

*"When you had important questions to ask a nurse, did you get answers you could understand?"*

The possible response categories are:

- Yes, always
- Yes, sometimes
- No
- Didn't have questions

If a patient answers this question "Yes, sometimes" or "No" then the patient is considered to have a problem with this aspect of care. Each of the items on the survey is similarly scored as either a problem or not a problem for each

patient. Using 28 report-type items from the Picker adult inpatient survey questionnaire, we can create a total problem score that ranges from 0 to 28 for each patient surveyed. Figure 1 shows the distribution of problem scores observed at the participating AHCs.

Like many patient surveys, the Picker Institute surveys have a question that asks patients if they would recommend the hospital to others:

*"Would you recommend this hospital to your family and friends?"*

- Yes, definitely
- Yes, probably
- No

As we would expect, the response to this question is strongly related to the number of problems reported. Patients who are highly satisfied with their stay are likely to "definitely recommend" the hospital (see Figure 2). This recommendation may stem partly from the positive experience and/or partly from a feeling of loyalty to the hospital. Conversely, patients who experience a number of problems with their care are much less likely to recommend the hospital to others.

We can use the exceptions to this pat-

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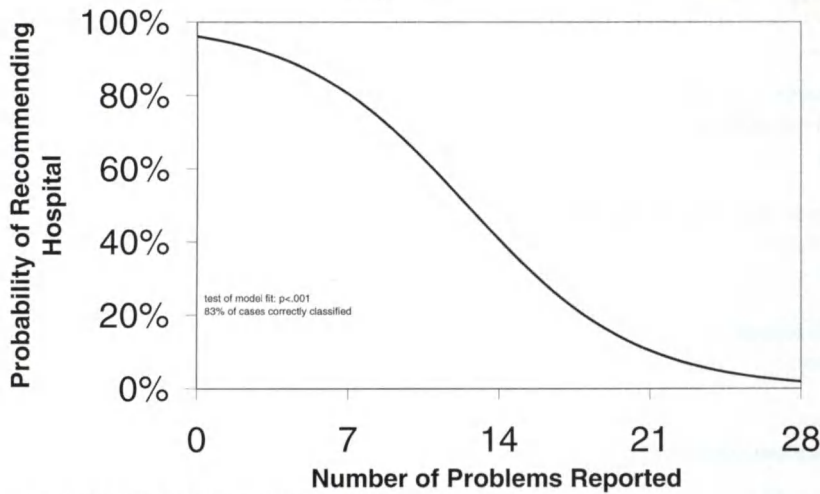
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Figure 2



source: 1998 UHC/Picker Institute adult inpatient satisfaction survey

tern to provide insights into patient loyalty. For example, what about a patient who reports numerous problems with the care received and nevertheless does recommend the hospital to others? If a patient recommends the hospital in spite of a bad experience, this strongly suggests that there is some sort of bond between the patient and the hospital that this bad experience was not able to overcome.

Overall, about 25 percent of the patients reported experiencing 10 or more problems with their care. For each hospital in our database, we can create a rough "loyalty index" by dividing the number of patients who report 10 or

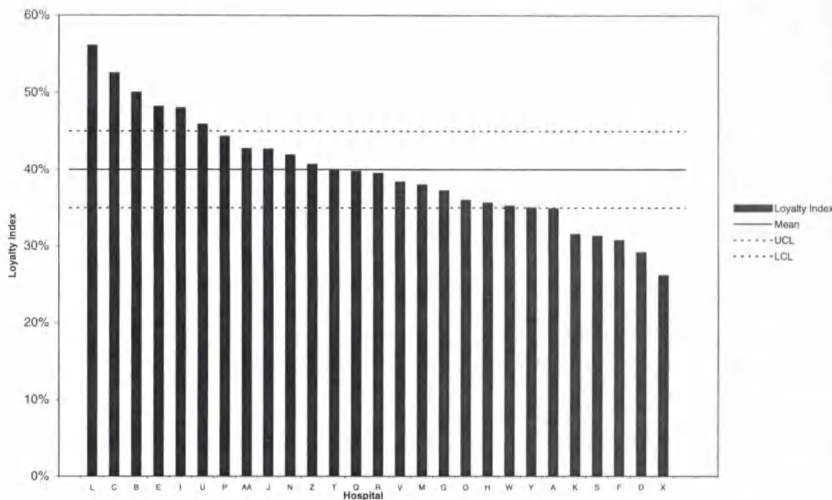
Furthermore, from these results we can construct a loyalty "norm" for adult inpatients at academic health centers of 40 percent. That is, an average of 40 percent of dissatisfied patients would nevertheless definitely recommend the hospital to others.

It is interesting to note that the 27 hospitals rank very differently on this loyalty index than they do on an item that measures overall satisfaction — in fact, the correlation between the two sets of ranks is only .38.

**Profiling the loyal patient**

Are there certain patient characteristics that are associated with loyalty? We can

Figure 3



source: 1998 UHC/Picker Institute adult inpatient satisfaction survey

more problems and who nevertheless "definitely recommend" the hospital by the total number of patients who report 10 or more problems. How do the various hospitals compare on this loyalty index? Figure 3 shows wide variations.

profile our loyal patients (in terms of background characteristics) to see what distinguishes them from the non-loyal patients. Figure 4 shows a profile of loyal patients for one of the hospitals in the study.



# Cultural Sense Making

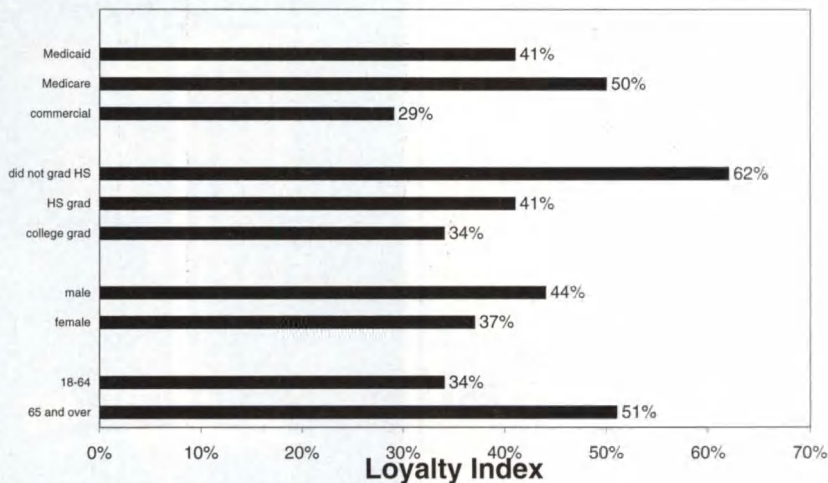
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**Figure 4**



This chart indicates that patients loyal to this particular hospital are more likely to be older, male, less well-educated, with Medicare or Medicaid coverage. Bear in mind that these results are based on dissatisfied patients only (those reporting 10 or more problems with their care), so differences in levels of satisfaction are not a likely explanation of these results.

#### **Conclusions**

By looking at the relationship between patient problem reports and willingness to recommend the hospital, we can make some inferences about patient loyalty from patient satisfaction data. If the same patient satisfaction survey is in use at a group of hospitals, then a comparative benchmark for the loyalty measure can be created.

The "loyalty index" described here is

clearly a proxy, not a pure measure, of patient loyalty. Some of the patients defined here as "loyal" may simply have been inconsistent in their responses to the survey. However, the strong relationships found between the loyalty index and patient demographic factors cast doubt on this as the only cause. A direct measure of loyalty would be preferable, but this would impose an additional burden on the patients and staff. In the absence of such data, conclusions can still be drawn from patient satisfaction data that is readily available from many health care organizations.

The loyalty link between customer and company is always fragile, and can be easily broken if the customer becomes aware of a new alternative. Follow-up interviews with customers identified as loyal from satisfaction survey data can help to pinpoint the nature of this link and show how it may be strengthened. **TM**

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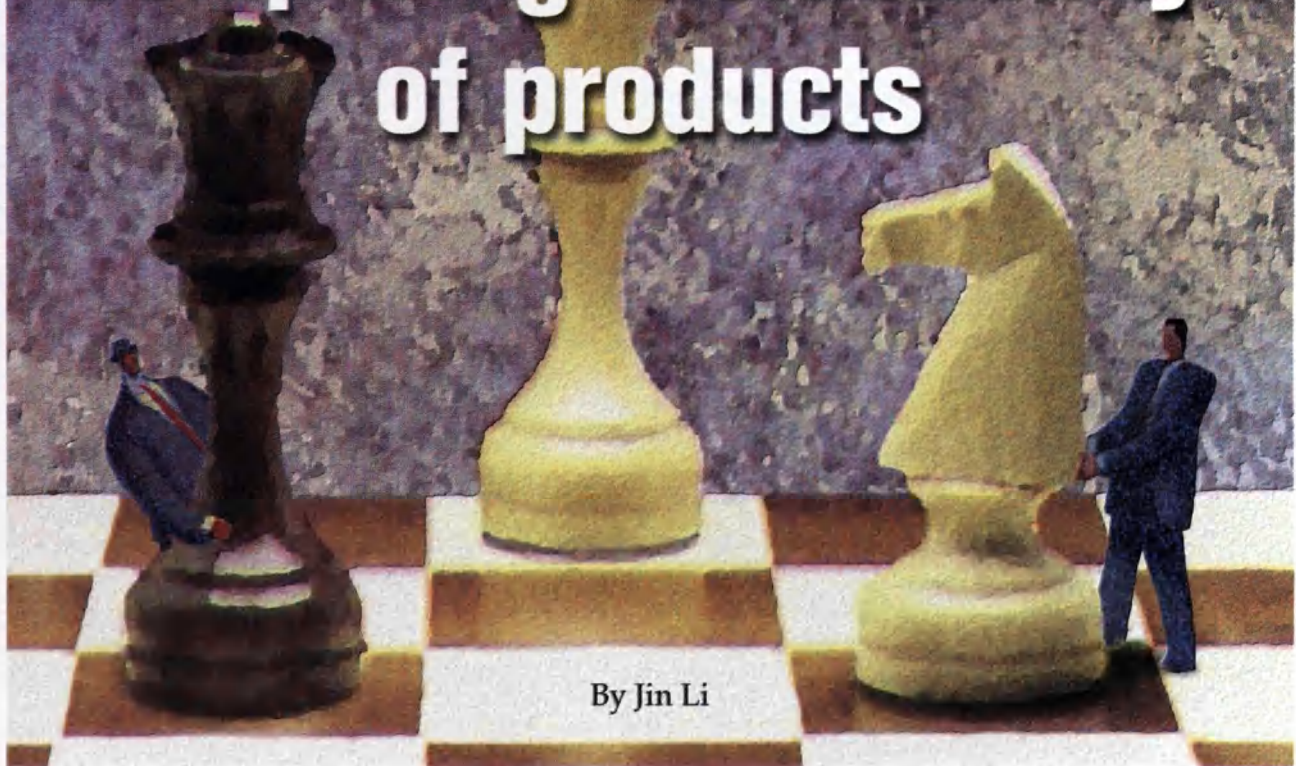
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# Beating your competitors:

## comparing the usability of products



By Jin Li

*Editor's note: Jin Li is a software designer in the User Centered Design group at the IBM Toronto Laboratory. He can be reached at 416-448-2857 or at jinli@ca.ibm.com. The author would like to thank his manager, Mike Fischer, for his encouragement, valuable feedback and support in this submission. He also wishes to thank*

*the people who were involved in the evaluation sessions.*

**C**ompetition in the marketplace is fierce, and having a competitive advantage often leads to the success of a product. In the past, having a leading-edge technology usually meant your product had the competitive advantage. However, as technology

matures and reaches the point that it meets the needs of users, having a cool technology is often not enough. Today, usability differentiates good and successful products from bad ones. This is especially true for consumer products<sup>1</sup>. Leading software and consumer product companies are now promoting ease-of-use and integrated solutions to sell to a more mature market. Users are no

# 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 Usategui summarized this point. In their report they emphasize that the pool of qualified respondents is drying up. Their concern: "Lack of representativeness resulting from refusals to participate . . . jeopardizes the accuracy of survey results. Evidence suggests that the decline in participation rates is already occurring and may accelerate."

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

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

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

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

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

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



Purchase-intention surveys can take you only so far; marketers would also do well to observe consumers in real buying situations.  
*Harvard Business Review*  
May-June 1998



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To determine if our product has an advantage over our competitors, we

perform a competitive evaluation. Competitive evaluation identifies areas where the prime competitive offering is most successful and areas susceptible to one's own offering<sup>2</sup>. It determines the

design strengths and weaknesses of the prime competitor. The output of this activity includes a prioritized list of the design strengths and weaknesses sorted by the degree to which they impact users' tasks and satisfaction. This outcome is used to facilitate product decisions on how to effectively compete in the same domain. In addition, the marketing team can take the evaluation results and create documents for use in competitive marketing situations in the field.

Traditional competitive evaluation that uses a feature-by-feature, bottom-up comparison approach does not provide the vital usability and design information required in today's competitive market environment. In addition, traditional competitive evaluations are costly in terms of time, budget and effort. It would be very useful if the existing competitive evaluation technique could be improved upon so that it would take less time to perform but would lead to meaningful information with respect to the product's usability.

In this article, we propose a higher-level approach for performing competitive evaluation to gather qualitative and quantitative usability and design information by setting realistic goals for expert users to carry out the required activities. Contrary to the traditional evaluation method, our belief is that the whole is greater than the sum of its parts. Feature-by-feature comparison ignores the interdependencies among user tasks. Furthermore, users don't perform tasks in isolation; they carry out an activity which is a set of interrelated tasks for a given goal.

### Methodology

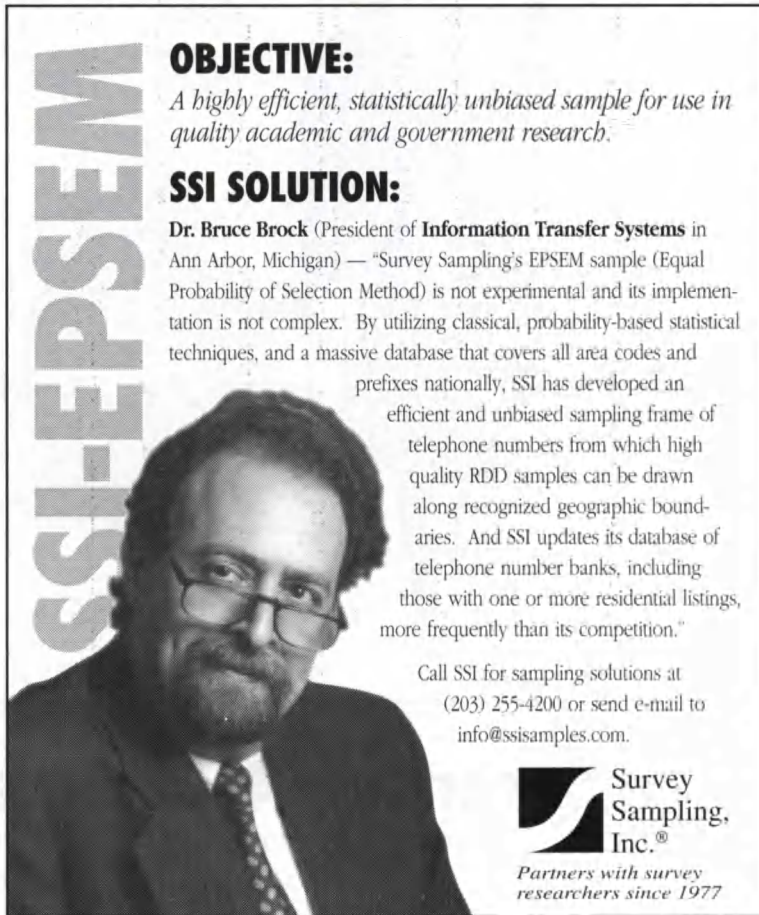
The essence of this methodology is to assess competitive products based on chosen metrics in a setting where natural task flows and real development scenarios would occur. Expert users are given a set of goals which define the scope of the tasks. It is important that this set of goals defines solutions to real user problems. Within our context, we consider "compile the Java source to byte-code" a task. We consider "1. Add a button; 2. Change the button label;" a description of a user scenario and task flow. Finally, we consider



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"Develop a Java applet with a push button labeled OK by hand coding" a goal.

Ideally, while the experts are using the product to solve the problem, they should not have to circumvent the product to optimize the solution. However, the frequency of such circumvention is a good indication of the deficiencies in the product. These workarounds and the differences in approaches taken while using the competitive products often provide great insights into potential redesigns and solutions to the usability problems discovered.

Expert users are given a set of goals along with the measurement metrics so that they can choose the most optimal

**Another benefit of this methodology is that one can obtain high-level information about expert users' task flows and typical development scenarios.**

path to solve the problem using the product. An analogy would be driving from point A to B. In the traditional evaluation method, drivers are given a map with a specific route highlighted from A to B and are asked to follow the marked route, even if that is not their natural or preferred path. In our method, drivers are given a map with A and B highlighted and are asked to go from A to B, with perhaps a few more constraints such as no more than 10 left turns. Each expert user is given a reasonable amount of time to practice their natural, optimal solution.

In the actual study session, expert users repeat their procedures for each goal three times. Full audio and video taping are done for both practice and actual sessions. The final metric for each expert is taken from the best (or average) of the three actual sessions.

This methodology is different from the traditional competitive evaluation approach, since it does not impose artificial tasks or scenarios on the expert users. Experts are given the end goal and they choose the optimal path to accomplish the goal following their own natural task flow. Time to execute the competitive evaluation is a key advantage of this methodology. In addition, we can be more confident about these results than the results from traditional evaluations, since we believe

that expert users employ realistic task flow.

They make fewer errors in this natural setting than they would when they are forced to carry out artificial tasks in traditional evaluations. Another benefit of this methodology is that one can obtain high-level information about expert users' task flows and typical development scenarios. Expert users often embellish their tasks while they follow the optimal path to accomplishing their goals. Since only goals are

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defined, human-computer interaction (HCI) professionals who have domain knowledge must administer the sessions and analyze the results. Without such domain knowledge, facilitators will not understand why expert users perform the tasks as they did.

### Applying the technique

We had the opportunity to apply this technique to compare Java programming tools that were available on the market. One of the objectives for our

Java programming tool was that it be one of the fastest rapid application development (RAD) tools on the market. The experts' goal was to develop a to-do list application using the Java development tool with which they were most experienced. The sub-goals, which the experts were asked to achieve in a stage-by-stage fashion, included the following:


- program the application visually;
- implement the application by hand coding;

- add a custom method to the application;
- debug the application;
- do the incremental edit-compile-debug cycle.

Since we wanted to know if our product was a faster RAD tool than those of our competitors, time to accomplish each sub-goal was used as the dependent metric. We found that higher-level goals are easier to identify than lower-level tasks and features, and are more readily agreed to by the product development team. These goals are akin to users' typical problems encountered in their daily software development. Consensus among the team members and realistic goals are important for the validity and success of a competitive evaluation. While running the competitive evaluation sessions, real-world tasks and scenarios are brought out naturally by the expert users in the specific development context. Bottlenecks in the product design are easily seen, and given the right goals, high impact issues and problems can be discovered quickly.

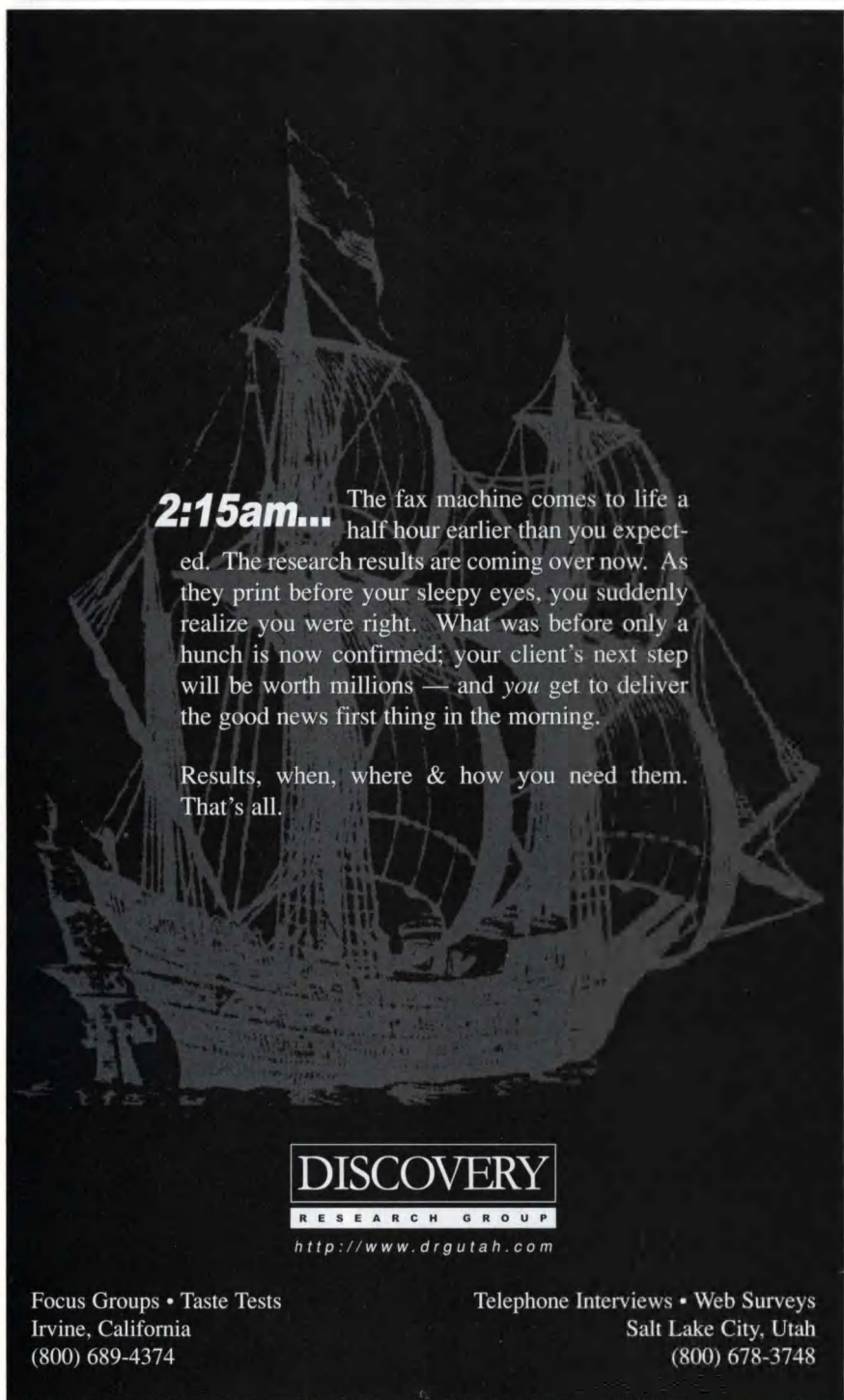
### Conclusion

We have described a new methodology for doing competitive evaluation to gather qualitative and quantitative usability and design information. Our recent experience indicates that it shows promise for comparing software development tools. We have found that we can obtain high-level qualitative information and achieve higher confidence in our results than when using traditional competitive evaluation.

We have used time as a measurement metric, but believe other objective metrics could be used as well. With our approach, expert users optimize their task flows to accomplish their tasks to achieve the given goals. The output from this methodology is more reliable and realistic. 

### References

- <sup>1</sup>Norman, D., *The Invisible Computer: Why Good Products Can Fail, the Personal Computer Is So Complex, and Information Appliances Are the Solution*, MIT Press, 1998.
- <sup>2</sup>Fischer, M., *Expert User Heuristic Walkthrough: An Efficient Method for Assessing the Usability of Competitor Products*, IBM internal publication, 1993.



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By Jonathan Sorensen

*Editor's note: Jonathan Sorensen is a marketing analyst at Sorensen Associates Inc., a Troutdale, Ore., research firm. He can be reached at 800-542-4321.*

We have all experienced what we might call the project from hell. This is the project that looks very execution-friendly and then, for unforeseen reasons, simply falls apart. Regardless of the anxiety and frustration these problems cause, there are two essential lessons to be learned from projects gone awry:

- Don't think failure; understand that reality is speaking to you.
- When projects go wrong, what you learn is often of equal or greater value than the data you were seeking.

These situations are particularly frustrating because everything looks so good on paper. The client and account staff design the test and it looks highly executable, even to the experienced operational eye. The client is competent and the researcher is competent but the study design assumptions and market reality fail to meet.

Take for example, a study once conducted in Chicago, the city the client had deemed its "best market in the country." The product samples were to be purchased in-store. Two days and 50 store visits later there was no product to be found. In a similar case in Boston, with a different client, the competing test product was finally found — dusty and hidden at the back of the shelves, having been discontinued the year before. In another study, a client had estimated a 30 percent incidence. The reality was a 5 percent incidence. How should we react to these types of situations?

First, there is no sense in assigning blame. In fact, usually no one is at fault. For any number of reasons, the study design can contain misinformation that frustrates execution.

Screening specifications for respondents may unwittingly be too restrictive. Either the target population doesn't exist as conceived, or more important, maybe the client misdefined the target population. Maybe their real market wasn't who or where they thought it was.

Often, the client may be unaware of its actual product distribution. At the broker's direction, the manufacturer may ship a product off to a

warehouse from which it is sent to a variety of distributors. Through three or four degrees of separation, the manufacturer has little concrete knowledge of who really buys the product.

Also, a miscoding of scanner data can give a product a miscount. The confused scanner data gives an inaccurate market picture to the manufacturer and then the client designs a study based on that picture. So, study

assumptions can be flawed regardless of the client or the researcher's expertise.

It is much more important to realize that when serious execution problems occur, reality is talking to us. Since it is the researcher's general aim to report market reality, this is extremely valuable information. Thus, though we want to smoothly execute field work, hammering a project through serious problems in order to quickly complete a report does a disservice to the client. It would be like a reporter, sent to interview an eyewitness, who loudly insists on a version of events that contradicts the eyewitness' own report. To avoid this we should react with sensitivity and curiosity instead of frustration.

Fortunately, barring field service mishaps, execution difficulties are richly informative. Simple and valuable lessons may be learned from messy situations. Consider again the introductory examples. In the Chicago study, it turned out that the Midwest was a major market but with Chicago as the distribution point. Chicago itself was not, per se, a significant market. This information may have been known to some in the company but not to other decision makers who were basing decisions on flawed information.

In the second example, at the time client marketing had initiated the project, the product was judged to be a serious competitor. But as the marketing wheels slowly turned, reality

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changed. Unknown to marketing, the competing product was pulled. Now marketing and product development were trying to solve a nonexistent problem. Embarrassing information? Maybe. But crucial to effective response.

As for the low incidence rate, this often means a miniscule market, unworthy of serious attention. So,

**In all these cases, the truth shining through the tatters of the project was of equal or greater value than the originally sought-after data.**

regardless of the mistaken design assumption, it was important for the client to take the true incidence rate into account. In all these cases, the truth shining through the tatters of the project was of equal or greater value than the originally sought-after data.

It takes a lot of sensitivity and curiosity to recognize the truth when it contradicts our assumptions. And reporting that contradiction requires credibility and confidence. But, the willingness to listen to market reality, even when it defies project parameters, will help the researcher develop a more accurate picture of the real market. And, as demonstrated, a more accurate picture of market reality is very valuable to the clientele. To pursue this reality we only have to remember that when a study, carefully designed according to market preconceptions, breaks apart on the rocks of market reality, then that reality is communicating as loudly and clearly as it can. The only failure possible is the failure to listen closely and to learn the truth. 

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## Plastic bottles

continued from p. 17

Lea & Perrins' steak sauce;

- the use of gusset bags for cereal products, i.e., an alternative to conventional box packaging.

### Next innovation

The next major structural packaging innovation is about to surface in the beer industry, specifically, the marketing of beer in plastic bottles. Already major developmental investments have been made by Anheuser-Busch, Miller, Coors in the U.S. and Bass Brewers in the U.K. and this is just the beginning. Existing consumer research on this plastic beer bottle concept (conducted by our firm and numerous beer marketers) points out how and how not to conduct packaging research. It also shows that evaluating packaging is different than evaluating other promotional materials.

When a sample of 457 beer

Brand Perceptions of Packaging Professionals			
	Expectations	Actual	Difference
The plastic will keep the beer cold enough	50%	79%	+
A plastic bottle is appropriate for beer	65	82	+
The beer will be refreshing	71	79	+
The plastic bottle would change the taste of the beer	35	21	+

drinkers were questioned about the plastic bottle concept, but did not actually see, feel or touch a bottle, the results highlighted the barriers

said they were very or somewhat likely. Conversely, 52 percent said they were not at all likely to purchase beer in plastic bottles. Their primary

The beer in the plastic bottle exceeded my expectations	39%
The beer in the plastic bottle met my expectations	52%
Total	91%

which must be overcome through effective advertising and promotion of beer in plastic bottles. Only 11 percent of beer drinkers said they were very likely to purchase beer in a plastic bottle, and only 29 percent

concern was product taste/flavor. Reservations included perceptions that:

- the plastic bottle would change the taste of the beer (the beer would pick up the taste of plastic);
- the product would not taste good;
- the product would not stay fresh;
- the plastic container would not hold flavor;
- the plastic container would not keep the product cold enough.

In addition, 14 percent indicated that the idea of drinking beer out of plastic just seemed wrong.

Given these findings, it would not be surprising to see beer marketers discard the plastic bottle concept. However, when a separate sample of beer drinkers were provided the opportunity to see, feel and touch a plastic beer bottle and subsequently open the bottle and drink the beer, the results were dramatically different:

- consumers were highly favorable toward a 16 oz. plastic beer bottle — rating it an 8.0 on a 10-point scale.

The plastic container was perceived to have the look of glass and the unbreakable safety convenience of cans. Beer drinkers also praised the plastic beer bottle for:

- its resealable top;

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- its light weight;
- its being unbreakable (safer);
- the beer's better taste (versus

beer in plastic bottles has begun and is probably here to stay. Marketing beer in plastic bottles provides a

imagery.

Structural innovations in packaging are occurring in virtually all categories. The use of plastic bottles in the beer category is just another instance of marketers taking advantage of new technologies to more effectively promote their products, convey points of difference, and educate and reinforce added value to the individuals who ultimately determine a brand's success or failure — the consumer. 

	Expectations percent	Actual percent	Difference percent
Very likely	32	55	+23

cans);

- its good feel (comfortable grip);
- its appearance — “looks like glass”;
- its non-slip surface;
- its recyclability.

When Perception Research Services sampled packaging professionals (before and after tasting beer in plastic bottles) the benefits of this new delivery system were evident (top chart, facing page).

Overall attitudes towards plastic beer bottles were overwhelmingly favorable (bottom chart, facing page).

In addition, 82 percent of these packaging professionals rated the plastic beer bottle (after tasting the product) excellent or very good.

These perceptions also translated to a positive shift in purchase likelihood (see chart, above).

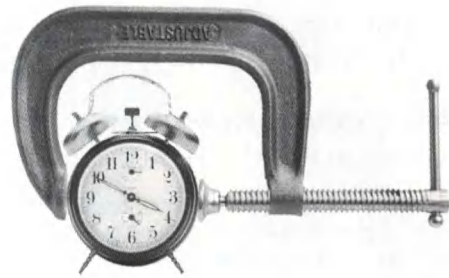
### See, feel, taste

Though the results from the consumer research conducted with and without beer drinkers seeing and feeling a package and tasting the product appear to be radically different, in reality they make a more important point. When researching new packaging concepts, it is imperative shoppers see and feel the packaging structure and, if possible, taste the product, rather than simply being questioned on their likelihood of buying or trying a new product entry. From this program of research, we have learned that beer drinkers will have to be educated about the benefits of plastic packaging in the beer category in order for it to be successful.

The bottom line from this information is evident: The marketing of

hedge against aluminum cans, which now amount to 60 percent of volume, and the glass bottle, which is more costly, yet helps to enhance brand

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## Reflective mirror

continued from p. 19

delight in telling me about them. This led to a series of interviews with other moderators at Strategic Marketing Corporation to gather input for this article. A simple request, "Tell me about awkward interview situations you have faced and how you dealt with them," inspired a flood of examples.

Much of this information will seem familiar to many of you and I make no claim for presenting cutting-edge techniques here, but my contributors and I were intrigued with the narratives this question prompted and the intensity of the responses it triggered — everyone wanted to know how their story stacked up against the others. The author hopes

that by reading this article some of the more experienced players in health care marketing research will be challenged to re-examine the game's fundamentals while some of the rookies will perhaps find new "moves" to add to their game.

### Reflective mirror

The basic theme of this article — the reflective mirror as it relates to sensitive health care market research issues — first surfaced in a discussion with a female Asian moderator who was relating her experiences with interviewing women in China for a study on yeast infections. She recognized that she would be asking intimate lifestyle questions of women who are normally quite reluctant to discuss such mat-

ters with anyone, let alone a stranger. To make matters more difficult, she discovered that in China a moderator is perceived to be a highly educated and important person — someone an uneducated Chinese housewife would not be comfortable speaking with on any subject (but that cash incentive is hard to pass up).

The moderator's problem was a matter of serious cultural and emotional issues that would inhibit responses. The solution she arrived at is perhaps obvious in retrospect but it worked well in this situation. She decided it was important to demystify the moderator in the respondents' minds and then verbally fabricate a mental mirror that would allow her respondents to reflect their personal thoughts in the guise of observations about the people around them.

She started each interview by telling the respondents something about herself, with particular emphasis on having already completed similar interviews with several Chinese women. In the moderator's own words, "I have conducted these interviews with many women and nothing you say can surprise me or disturb me." Through the use of this simple statement (and positive body language) she was able to demystify the moderator. She then erected the reflecting mirror by asking direct questions in an indirect manner, "Other married women have told me that they are sleeping in separate beds because of this condition. What do you think about that?"

By asking respondents what they thought about the actions of others, she accomplished two things:

1. She defined the scope and depth of the responses she expected, i.e., other married women . . . are sleeping in separate beds; this is not just about irritation or discomfort: I hope that you will discuss the impact of this problem on your lifestyle and personal relationships. She indicated how far the respondents were expected to go and acknowledged that others had already gone that far.

2. She gave her respondents a level of personal comfort and security by allowing them to frame their responses in the form of opinions and attitudes

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about others — “What do you think about that (them)?”

### Very illuminating

While admittedly not exactly an earth-shattering revelation, this dual process of demystifying the moderator and erecting the mental mirror revealed itself in various guises throughout all of these moderator interviews and I think it is very illuminating to hear the different ways in which it was used.

For example, another researcher described individual depth interviews (IDIs) he had completed with patients suffering from end-stage prostate cancer. It became obvious early on that some of these patients were in denial and anticipated a dramatic turnaround in their prognosis. To ask these men to discuss problems relating to a terminal disease would have been too emotionally painful, especially in the context of a study exploring newer/better therapies (than the ones they were already on). It also ran the risk of interfering with the patient/doctor interaction. The reflective mirror, in this case, took the form of questions such as, “From others I have interviewed I’ve learned that bone pain is sometimes a consequence of this type of disease and I would like to know what your experiences and thoughts are on bone pain.”

I have moderated a number of physician focus groups and IDIs in which the challenge was to motivate them to discuss their problems and/or therapeutic failures. In these litigious times, that is becoming increasingly more difficult to do. In terms of demystifying the moderator, I have a built-in advantage that gives me a bit of an edge — as a former dentist I can let respondents know that I spent many years treating patients and have had my share of cases that just did not work out.

If you have an edge, exploit it whenever you can! For those who do not, the best approach is to acknowledge at the appropriate point in the interview or group that you are going to ask questions that might be somewhat controversial (e.g., How do adverse clinical outcomes in this drug category influence your treatment decisions?), emphasize your impartiality as a professional moderator who has discussed

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sensitive issues with physicians many times before and re-confirm that strict confidentiality is being maintained — then ask the questions, look serious and wait.

In interviews or focus groups with physicians, the second phase of our paradigm, erecting the reflecting mirror, is often the easier of the two tasks — frame all questions in the third-person, “As a professional who has been in practice several years, I’m sure you’ve observed situations in which some of your colleagues’ clinical outcomes did not meet diagnostic expectations. Tell me about some of these situations.”

### Lifestyle club

In another example, a female colleague described a series of focus groups she had moderated on the subject of erectile dysfunction (ED) with female partners of men who have ED. In response to a question on efforts to find solutions and resources a respondent started to describe a “lifestyle club” that she and her husband belonged to. It quickly became apparent to the moderator that this “club” was founded on the theory that sex with various women is beneficial for the problem and that this woman was basically describing an ongoing house-to-house sex party.

The moderator became concerned about jarring what, up until that time, had been a smoothly running group. She realized it would be best to quickly end this line of conversation and not give the rest of the group an opportunity to embarrass the woman with their comments. Her first instinct was to personally display no overt reactions. She knew that if her body language registered disapproval, the respondents would mirror her response. She demystified the woman’s comments by interrupting her with, “Okay, I understand. That’s interesting. Did it help? Thank you.” and then quickly raised a new question and moved on in a totally different direction. Later comments from this same respondent caused the moderator to conclude that she was sincere (if perhaps somewhat misguided) and would have been hurt by any untoward

remarks on the part of the group.

### The winner

And finally there is the experience of my luncheon colleague — clearly the winner in our duel over worst-case scenarios. He found himself in the situation of having to moderate focus groups with women who suffer from urinary incontinence. Humor comes quite naturally to this individual and he chose to use self-deprecating humor to demystify the moderator. His first comment to each group was, “The subject to be discussed is urinary incontinence and you’re probably wondering what career-ending move I made that resulted in my being here today.”

At another point in his introductory remarks he acknowledged the sensitivity of the situation with, “When I think of you volunteering to come here today to discuss this subject, I realize that it took a lot of courage.” He encouraged participation with, “Your input here today will be used to help others with this same problem.”

The reflective mirror in this case took the form of pointing out that this focus group represented a unique opportunity to hear from other people at the table who know what each respondent was going through. These focus groups proved to be a very satisfying experience for this moderator: What started out as a particularly tough assignment (especially for a man) resulted in groups that were cooperative, candid and that generated a solid body of information for his client.

### Extend education

There were additional comments during my discussions with my colleagues that are worth noting:

- A lot of the health care market research being conducted today relates to quality of life issues, e.g., hormone replacement therapy, diet and exercise versus drug therapy for the control of hypertension, sexual dysfunction, etc. A moderator has to extend his/her pre-project self-education beyond an understanding of the pharmacology or therapeutic dynamics of the products

being investigated.

You have to explore the deeper, underlying currents that often influence decision making processes, e.g., how hard is a physician willing to “push” patients to use a drug that works well but requires carefully timed, multiple daily doses (efficacy versus compliance issues)? What are the contributing motivational factors to anticipate in discussing drug therapy with diabetic patients? Many women consider osteoporosis to be “an old woman’s disease” — how do you get younger women to give it serious thought within the context of a discussion of hormone replacement therapy?

• I recently came across a clever term for a well-established, basic tenet of qualitative marketing research — “sophisticated naiveté.” This may be defined as “thorough preparation and self-education prior to the project, coupled with feigned ignorance during the study.” It provides a subtle but effective means for probing or challenging — the respondents’ efforts to simplify and explain will often expose underlying factors that impact their thoughts and attitudes. Sophisticated naiveté can take many guises: the one I use most often is, “Remember doctor, you’re talking to an ex-dentist. Could you ramp that down for me just a bit?” Whenever it suits the purpose of the study, a moderator should invoke sophisticated naiveté in asking for clarification (e.g., “I’m sorry — I’m not a physician — it’s not clear to me what you meant by that. Please run it by me again . . . how do the rest of you feel about this?”).

• The first few minutes of any interview or focus group — the warm-up — is a critical time for establishing respondent confidence in the integrity of the moderator and the research process. In studies involving sensitive issues, it is also the appropriate time to begin the process of demystifying the moderator and acknowledging the sensitive aspects of the discussion.

• In dealing with issues that have a potentially emotional impact, a time-honored marketing research principle is to begin with questions that are somewhat abstract and work towards

the specific. In focus groups with chiropractors, I quickly discovered that the subject of pain management generated a more emotional/philosophical level of responses compared to the physicians I had interviewed — most likely related to significant differences in their training and philosophies of treatment. Instead of starting out with “Describe your therapeutic ladder for pain management,” it proved more productive to begin the chiropractor groups with an abstract, “What role does pain generally play with regard to patient management problems and therapies?” Once they were sure I “knew where they were coming from” (and my body language connoted appropriate deference towards their treatment methods), the needed information poured forth.

Moving from the abstract to the specific works well with chiropractors but it can also be a very effective strategy for interviews with a wide range of professionals. It eases respondents into the subject, makes them more comfortable with the

process and often yields more insights.

I sincerely hope this process of demystifying the moderator and erecting the reflective mirror will prove of value to those of you who actively deal with qualitative health care marketing research issues.

In recognition of those who told me of their experiences and graciously allowed me to narrate them (and to my ex-officio editors), I would like to extend my gratitude to Terri Maciolek, Bernie Schwartz, Bob Kernish, Grace Chin, Donna Caldwell, Juliet Goodfriend and Laurie Harris for their important contributions to this article. ☞

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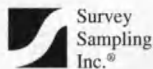
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## Survey Monitor

continued from p. 6

### 1998 a solid year for new products

The stock market may have had its ups and downs in 1998, but things were solid on the new product front. For the second year in a row, packaged goods firms pumped out more than 25,000 new food, beverage, health & beauty aids, household and pet products, according to Naples, N.Y.-based Marketing Intelligence Service, Ltd., a new product reporting firm. While 1998's count didn't eclipse 1997's record, there was no shortage of new products to choose from on store shelves.

Truly innovative new products, however, continued to be rare. Just 5.9 percent of the entries reported by Marketing Intelligence Service in 1998 earned an Innovation Rating. A qualitative measure of new product introductions, the firm's Innovation Ratings measure the number of new products with breakthrough features or benefits in any one of the following six areas: formulation, positioning, packaging, technology, creating a new market, and merchandising. While 1998's overall Innovation Rating edged up slightly from 1997's 5.8 percent figure, innovation has been trending down since 1986, when the peak Innovation Rating of 18.6 percent was achieved.

While the percentage of innovations may have been small in 1998, a number of entries offered outstanding new features and benefits. The following top 10 new product innovations were chosen by Marketing Intelligence Service, Ltd. from the more than 25,000 new product introductions reported in 1998 in the firm's *Product Alert* publication.

• With more of us eating on-the-run, yogurt would seem to be

left out in the cold. Don't tell that to Minneapolis-based General Mills, which found a way to make yogurt portable with Yoplait Go-Gurt Yogurt. This kid-friendly yogurt is packed in a tube that eliminates the need for spoons. Just rip open the tube, put the open end in the mouth and squeeze. And since the tubes can be frozen and thawed for consumption later in the day, Go-Gurt is great for lunch boxes and bags.

• Sound Bites Lollipops may be the year's strangest and most fun innovation; just insert a lollipop into the battery-operated Sound Bites handle, bite down on the sucker and hear music playing inside your head. Sound Bites works by conducting sound vibrations through the lollipop



into your teeth and inner ear for an experience like no other. Priced at around \$10 for the handle, batteries and two lollipops, it's new from Campbell, Calif.-based Oddz On/Sound Bites.

• Why should Haagen-Dazs and

Ben & Jerry's have all the fun? Now you can make your own ice cream at home, faster and easier than ever before without any special equipment with Geno's Instant Ice Cream Mix. Packed in a 32 fl. oz. drink box, this liquid mix is refrigerated prior to use and then shaken and poured into a bowl together with whatever flavorings you choose — fruits, nuts, cookies, chocolate chips, candies, etc. The mix is then poured into a covered container and frozen until firm. It's new from Southington, Conn.-based GMV Desserts, Inc.

• Is the pickle your favorite part of a hamburger? If so, you're in luck. With new Vlasic Hamburger Stackers Pickles you get a pickle in every bite of your burger. That's because these pickles measure a whopping three inches in diameter, yet are packed with taste and crunch. A horticultural triumph, Hamburger Stackers are made from specially-bred cucumbers

that grow 10 times larger than standard pickling cucumbers. They're new from Vlasic Foods International, Inc. of Cherry Hill, N.J.

- It's hard to find a section of the supermarket that's not drowning in funky flavor blends right now. But what makes Kellogg's Nutri-Grain Twists Cereal Bars special is not the blended flavors, but how the flavors are blended. Kellogg takes two flavors (strawberry and blueberry, for example) and puts each in its own separate soft baked crust "tube" that is twisted over and under a "tube" which holds the other flavor. The two are combined when you eat the bar for a unique flavor twist. Battle Creek, Mich.-based Kellogg USA is the manufacturer.

- If two blades are good, then three must be nirvana. And so it goes for the Gillette Mach3 Triple Blade Shaving System. Said to offer the closest shave ever in fewer strokes, all with less irritation, Mach3 is replete with bells and whistles. The shaver is the first with three progressively aligned blades, the first with a lubricating strip that fades to signal that it's time to replace the razor and the first with mistake-proof cartridge loading. Boston, Mass.-based Gillette Company is the manufacturer.

- Drano Foamer Clog Remover attacks gunk where liquids can't reach. Unlike liquid drain cleaners which run along the bottom of the pipe section, where most clogs occur, Drano Foamer fills and clears the entire pipe section to keep drains clear longer. Boxes containing two packets of this concentrated powder treatment are new from Racine, Wis.-based S.C. Johnson & Son, Inc.

- Pink underwear syndrome may go the way of the dodo bird if Carbona Dye Magnet has anything to do with it. Just drop this sheet on top of the laundry and add detergent. Dye Magnet's "magnetic" properties absorb excess dye and grunge, preventing colors from bleeding onto one another while actually washing clothing in cleaner water. Use Dye Magnet and you won't have to worry about separating the whites from the colored clothes. Better yet, Dye

Magnet can be used over and over again. If ever a product were tailor-made for college campuses, this would be it. Thank Fairfield, N.J.-based Delta Carbona for this one.

- A record number of products debuted in 1998 boasting antibacterial properties. One of the most clever was Cut & Toss Disposable Cutting Boards. As the manufacturer, St. Albans, Vt.-based Fonda, notes, the

most sanitary cutting board you can use is the one you don't re-use. More sanitary than wood or plastic cutting boards, Cut & Toss is flexible with fold-up sides which make usage and cleanup a snap.

What is going to be hot in 1999? How about allergy control. With the average person spending up to 90 percent of their time indoors, allergies caused by indoor pollutants are on the rise. S.C. Johnson & Son's inno-



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vative new AllerCare line was designed for allergy sufferers and includes Dust Mite Carpet Powder and Dust Mite Spray Carpet & Upholstery Allergen Treatment spray. Both claim to reduce dust mite allergens for up to four weeks, keeping dust and dust mite allergens from becoming airborne.

The U.S. doesn't have a patent on innovation, as these top five international innovations chosen from the new product innovations featured in International *Product Alert* show.

- Allergy sufferers can find relief with a new gum now available in the Japanese market. Lotte Tencha Mint Gum not only delivers cool and refreshing taste, it's also claimed to help combat allergies.

- Multix Antibacterial Cling Wrap does more than just cover food, it protects it from bacteria. New in Australia, this cling wrap is treated with Microban.

- Glow in the dark drinks are now a reality thanks to new Phota Lite Glow in the Dark Powder. Debuting in Japan, the powder contains the enzyme responsible for light generated by fireflies and is marketed as a fun drink additive.

- No time to blow dry your hair in the morning? Use new Lazartigue Rapid Drying Shampoo and you'll have nothing to worry about. That's because this U.K. entry reduces drying time by as much as 30 percent.

- Keep ant infestation in check and clean your floor at the same time with S.C. Johnson's new One Stop Protective Floor Polish. Available in South Africa, it keeps floors shiny clean and repels ants for days with its natural ant repellent.

For more information call Tom Vierhile at 800-836-5710, ext. 28, or visit the company's Web site at [www.productscan.com](http://www.productscan.com).

## Jewish American travelers enjoy visits to Israel

A majority of Jewish Americans who have been to Israel are likely to return in the future, according to research from Princeton, N.J.-based

Response Analysis Corp. The firm conducted 1,206 telephone interviews among a representative sample of Jewish Americans who have taken a vacation in the past two years or who plan a vacation in the next 12 months. It is estimated that three out of four Jewish adults (3.4 million) meet this vacation criterion. There are 4.5 million Jewish adults, age 18 and over, in the United States.

The survey was conducted for the Government of Israel to better understand how Jewish American travelers feel about Israel as a travel destination. Arie Sommer, Israel Tourism commissioner for North America, says, "Our repeat travel market to Israel is very large. Jews like what they experience. They have good feelings about Israel's hotels, its weather, and the wide range of things to do in Israel. Half of our visitors want to spend more time in Israel on their next trip."

Approximately one million Jewish American travelers are interested in returning to Israel (698,000) or visiting Israel for the first time (324,000). Six out of 10 Jewish Americans, including those who have been to Israel and those who have not, said they were very or somewhat interested in visiting Israel to celebrate the 50th anniversary of Israel being declared an independent state.

Jewish Americans perceive Israel's greatest strengths as a place to visit to be: sightseeing opportunities, historical significance, cultural activities, and religious significance. However, they give Israel mixed reviews on some of the more traditional travel criteria: fairly strong ratings for "good weather" and "good hotels"; low to moderate ratings for "nice place to relax," "good value for the money," and "good restaurants." Israel's lowest rating is on "a safe place to go."

Among the additional findings are:

- 51 percent of Jewish Americans who have visited Israel have been there multiple times;
- 62 percent of Jewish Americans who have visited Israel traveled inde-

pendently (i.e., not as part of a tour group);

- Jewish Americans also like to travel overseas to France (17 percent), Britain (17 percent), and Italy (13 percent).

For more information call 609-921-3333 or visit the company's Web site at [www.response-analysis.com](http://www.response-analysis.com).

## College students respect authority, creditors

With graduation just around the corner, today's 18-24-year-old college students may be ready to live up to their reputation as a new crop of consumers, respecting creditors and authority figures and caring for the environment as well, according to a recent Pulsefinder On-Campus Market Study.

The study points to a shift in college students' attitudes toward environmentalism, joining the workforce, and assuming responsibility for their own

subjects, the study also covered college students' activities on the Web. The number of college students making purchases on-line has jumped from 43 percent to 61 percent in the past year. On-line consumer activity among this segment has increased overall since 1998, with more frequent visits to search engines, as well as travel, entertainment and shopping sites. The study also found increases in the number of hours spent on-line and in the number of daily log-ins.

The Pulsefinder study, which was conducted by Greenfield Online, Inc., Westport, Conn., and Network Event Theater, Inc. (NET), surveyed 1,400 four-year college students drawn from an on-line research panel of 30,000 students ages 18-24. To qualify for the study, all participants had to have Internet access. The sample then was balanced to represent the national four-year college population in terms of gender and region. For more information call Gail Janensch at 203-429-

What Today's College Students are Doing On-line		
Activities	1999	1998
Surf the Internet	86%	79%
Go On-line More Than Once Per Day	65%	54%
Spend 1-4 hours On-line Per Day	36%	26%
Regularly Visit Search Engines	79%	77%
Regularly Visit Entertainment Sites	62%	52%
Regularly Visit Shopping Sites	34%	16%
Travel Sites	21%	14%

finances. Fifty-four percent claim to be "environmental activists," while 45 percent of today's college seniors believe they will have "no problem finding a job" after receiving a diploma and one out of five believes it's "in" to be "working hard at school." Over 70 percent agree with the statement "I respect authority" while more than half say it is "out" to be interested in fraternities and sororities. More than half say they are paying all their credit card bills themselves.

In addition to surveying college students' attitudes toward these and other

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## Web users look for a little control

Cognitative, Inc., a San Francisco consulting firm, has released findings from recent Pulse of the Customer focus group research. The findings uncover Web users' attitudes and feelings on personalization, privacy and targeted marketing on the Web, as well as highlighting Web usage and awareness trends.

Topline findings include:

- Of Web customers, 32 percent dislike sales-oriented e-mail so much they actually avoid doing business with the sender.
- Ninety percent of Web customers prefer broad choice over vendor-controlled personalization.
- Few vendors are doing a good enough job with on-line customer service, even though more than 59 percent of business customers consider receiving on-line customer service their most important Web activity, and prefer it to telephone support.

According to the research, personalization works best when customers feel they are the ones controlling it and making the decisions about how it is used. Examples of personalization that customers like include being able to: design their own pages; control what information is presented to them; request information based on their specifications; and link to other sites that interest them.

Web personalization backfires when customers perceive that their personal information is being misused. Customers say that personalization can feel intrusive, invade privacy, limit their options and too often forces them down the wrong path.

"It's all an issue of control," says Laurie Windham, founder and chief executive officer of Cognitative. "On-line users feel very strongly about intrusive marketing practices, and are choosing via their keyboards with whom they do business."

For example, one-third of customers dislike sales-oriented e-mail

so much that they avoid vendors who send them. In fact, only telemarketing rated as more intrusive than unsolicited e-mail. On the positive side, respondents noted that they feel empowered by trusted vendors with whom they have a relationship, and that Web personalization and appropriate communications help them save time and broaden their exposure.

In related findings, on-line customer service efforts are falling short of customer expectations. Customers prefer responses to their questions within a few hours, but response times of one day are acceptable. Few vendors are doing a good enough job with on-line customer service at this time. The study also found that exceeding customers' expectations can result in extreme brand loyalty. "To date, on-line customer service has been so dismal for many customers that when vendors are actually responsive, the customer is surprised, delighted and loyal for life," says Windham.

The research also showed that:

- Consumers' top three Web site activities are searching (83 percent), on-line purchasing (83 percent) and comparison shopping (67 percent).
- Business users' top three Web site activities are searching (94 percent), comparison shopping (82 percent) and customer service/problem resolution (59 percent).
- Consumers discover/find new Web sites via word of mouth (100 percent), Web site links (83 percent), advertising (67 percent), magazine articles (61 percent), newspaper articles (50 percent) and conferences (17 percent).
- Business users discover/find new Web sites via magazine articles (94 percent), Web site links (88 percent), advertising (76 percent), word of mouth (71 percent), newspaper articles (53 percent) and conferences (47 percent).

Topline findings are available on-line at [www.cognitative.com](http://www.cognitative.com) or by sending an e-mail request to [deadahead@cognitative.com](mailto:deadahead@cognitative.com).



## Product & Service Update

continued from p. 11

ended responses by dining facility; and complete crosstabs of all survey questions by dining facility. Bimonthly "flash reports" are also provided depicting participants' overall satisfaction with dining services as well as the performance scores for features related to food quality, menu, personnel, service and sanitation. Other customized reports can be provided upon request. For more information call Scott Hoffmire at 901-755-9911.

## Nielsen service tracks computer purchases

Schaumburg, Ill.-based ACNielsen U.S., an operating unit of ACNielsen Corporation, has launched Homescan Tech\*Watch, a research service that tracks consumer purchases of computer hardware. Utilizing the company's Homescan consumer panel, Tech\*Watch is a syndicated omnibus research service available to computer hardware retailers and manufacturers. Each quarter the service queries 26,000 households about their purchase of personal computers, monitors and printers. All purchasing channels are covered as well as price paid, intended use, whether the computer was purchased as a bundled package, brand loyalty and more. Complete demographic profiling is also available. For more information call 847-605-5000 or visit the company's Web site at [www.acnielsen.com](http://www.acnielsen.com).

## Scantron offers Web hosting services

Scantron Technologies, a Tustin, Calif., data management firm, is now offering eListen Web Hosting services for the eListen product, the company's electronic survey and data collection software system. Organizations interested in running Internet-based surveys, using Web technology, can now create and deploy customized surveys at

[www.elisten.com](http://www.elisten.com).

The eListen Web Hosting service allows users to quickly launch customized surveys within minutes. Users may choose to create a survey with the eListen software or retain

Scantron Technologies for survey development. Once the survey instrument and secure on-line registration form are completed, users are sent an e-mail with the pertinent uniform resource locator (URL) links to view

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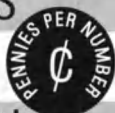
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their survey, reports and administration preferences.

The eListen Web Hosting services offer multiple options to securely view and retrieve data collected on-line. Data is continuously pumped into a database where users may view on-line reports and download Microsoft Access data files directly to their personal computer. Upon request, data files may also be transferred onto a CD-ROM.

First-time users can evaluate the eListen software and Web Hosting service free for the first 30 days by downloading the software at [www.elisten.com](http://www.elisten.com). Users may then choose to purchase the software and the Web Hosting. For more information call George Saroyan at 800-722-6876 or visit the company's Web site at [www.scantron.com](http://www.scantron.com).

## New survey tool from Saja

Saja Software Inc., Longmont, Col., has introduced Survey Select Expert, a survey software tool equipped with Internet, reporting and database capabilities. The software complements Saja's flagship product, Survey Select, and enables users to integrate interactive survey strategies into corporate human resources, consumer marketing or research initiatives.

Survey Select Expert utilizes Java, HTML, and XML technologies to provide customizable and functional survey design, administration, analysis and reporting/presentation capabilities. The software provides several approaches to conducting surveys, including intranets and Internets, local area networks (LAN), e-mail, floppy disks or hard copy.

The new software's network capabilities enable multi-user support of on-line survey strategies. Subsequently, unlimited users can be directly involved in survey design, administration, analysis and reporting, including transferring files and manipulating surveys, answer scales and topics. The product's survey design features allow one or more

networked users to build surveys from customized question libraries on the fly using Survey Select Expert's "Quick Survey" feature. The product offers users dual-scale question design capabilities to measure both satisfaction and importance levels simultaneously. Additional formatting options and new scales are also added to the survey design process.

Once survey answers are compiled in the Survey Select Expert database, they can then be imported/exported directly to/from: Survey Select Expert's spreadsheet view, list view or data entry wizard for analysis; an SPSS statistical program for in-depth analysis; or ODBC databases for archiving. Users needing sophisticated reporting choices can customize reporting information with advanced graphing functions while other users wanting simplicity can generate common reports automatically utilizing Survey Select Expert's report wizard. The tool can then publish reports to a printer or in HTML, RTF and ASCII formats. A free, self-running demo and/or interactive trial version of Survey Select Expert is available by visiting the firm's Web site at [www.surveymselect.com](http://www.surveymselect.com). Or for further information call 800-945-0040.

## New site for Internet research

Internet.com LLC has launched AllNetResearch.com, an e-commerce site for buying and selling Internet industry research. The site currently offers Internet market research reports and newsletters from research organizations in North America and Europe. Early participants include CyberDialogue, PhoCusWright, Fletcher Research, Creative Good, HighText Verlag and the Association of Internet Professionals.

Internet research buyers will be able to buy reports on-line after retrieving descriptions of publications, tables of contents, and shipping information. AllNetResearch.com will receive pro-

motional support from the internet.com network of 47 Web sites, including CyberAtlas, a compendium of Internet market research on the Web.

AllNetResearch.com is part of internet.com, the e-business and Internet Technology Network. The network includes 47 Web sites, 27 e-mail newsletters, 19 on-line discussion forums, and 45 moderated e-mail discussion lists for Internet industry and Internet technology professionals, Web developers, and sophisticated Internet users. internet.com sites include InternetNews.com, which provides daily Internet-specific news; The Electronic Commerce Guide; ServerWatch; The Web Developer's Virtual Library; SearchEngineWatch, and Jumbo.

## Banner ad evaluation research tool launched

New York-based VRROOM, the Virtual Research Room, has introduced the BANNERater to provide real-time evaluation of banner ads during on-line focus groups. Advertisers, clients, and developers will now have available a methodology to test banner ad effectiveness and help address growing concerns over declining click-through rates. BANNERater was developed jointly with Canada's Interactive Tracking Systems Inc. (i-tracks.com), a developer of Web application software. For more information contact David Bradford at 212-390-5633 or visit the company's Web site at [www.vrroom.com](http://www.vrroom.com).

## Geo-based reports on-line from NDS

National Decision Systems, through its [www.sitereports.com](http://www.sitereports.com) Web site, has now made standard geography-based reports available on-line. Users now have the expanded option of creating reports based on larger trade areas. The standard geography feature allows users to select

from a list of geographies, and then guides them through a step-by-step process to complete their report. Users can choose from the following standard geographies: ZIP code, place, county, state, MSA and the

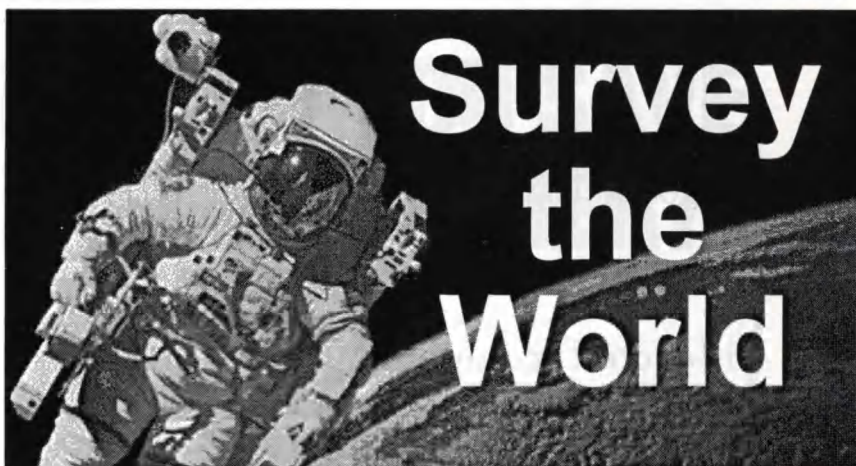
U.S. Up to 30 geographies of the chosen selection type can be aggregated for display on the same report. For more information visit [www.sitereports.com](http://www.sitereports.com) or call 800-866-6510.

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## Data Use

continued from p. 14

with a mean of 60) is more precise than a wider one (say 50 to 70). The former requires a larger sample size than the latter. In this example, you have chosen  $d = 10$ .

We usually don't know the population standard deviation ( $S$ ). However, you may make educated guesses about it and calculate the size of the sample based on the guesses. For instance, you may guess that the population standard deviation is 30 and then the required size of the sample will be:

$$n = \frac{1.96^2 * 30^2}{10^2} = 34.6$$

Rounding up the number of 34.6, you need a sample size of 35 to be 95 percent confident that the true mean of physicians' weekly working hours is within a half width of 10 hours. In other words, you are 95 percent confident that the true population mean ranges from 10 hours lower to 10 hours higher than the mean you obtain from the survey of the sample of 35 physicians.

Note that a higher confidence level would require a larger sample size. In the example above, if you want to increase the confidence level from 95 percent to 99 percent, you then

substitute 1.96 for 2.58. You would need a sample size of 60. The precision of the estimate of the variable is inversely related to the size of sample. Thus, a decrease of value of  $d$  (a higher precision) requires a larger sample size. Since the variability of population is positively related to the sample size, an increase of value of  $S$  increases the sample size.

Suppose now we have  $d = 5$ ,  $S = 40$  and the confidence level of 99 percent. Put these values into the formula, we find that the required sample size is:

$$n = \frac{2.58^2 * 40^2}{5^2} = 426$$

### B. Variable of interest is a dichotomous variable

#### Case study two

*A company is interested in knowing the percent of market share of drug X prescribed by primary care physicians for the treatment of diabetes Type I patients. You are asked by the company to conduct a survey among primary care physicians to find out the percent of these physicians' prescription of drug X. Based on a pilot study, 10 percent of patients with diabetes Type I were prescribed drug X by primary care physicians. You want to be 95 percent confident that the true population percent of market share of drug X is no more than .05 greater or less than the proportion you*

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estimate from your survey. What is the required sample size?

Here, the proportion of market share of drug X is the variable of interest. It is a dichotomous variable.

The formula of calculating the sample size is:

$$n = \frac{Z^2 (p (1-p))}{d^2}$$

Where:

n is the size of sample;

Z is the z-statistics for the desired level of confidence;

p is the estimate of expected proportion with the variable of interest in the population;

d is the half width of the desired interval.

Again, Z = 1.96 for the 95 percent confidence level and 2.58 for the 99 percent confidence level. In the example above, p = .10 and d = .05. Put these values into the formula, we have a required sample size:

$$n = \frac{1.96^2 (.1 (1-.1))}{.05^2} = 138.3$$

Thus you need to have 138 physicians in your sample to be 95 percent confident that the true proportion of market share for drug X in the population is within .05 of the proportion you estimate.

Here, p refers to the proportion you estimate from the survey about the market share for drug X. Since p (1-p) is positively related to the required sample size, the maximum value for p (1-p) is when p = 0.5. For that reason, when you have no prior knowledge or assumption about the market share for that drug, you can calculate the sample size based on a worst-case scenario when p = .50; d in this case equals .05:

$$n = \frac{1.96^2 (.5 (1-.5))}{.05^2} = 384.16$$

You thus need 384 physicians in your survey.


It should be noted that, in this article, sample size is calculated for descriptive study. For studies that may involve inference statistical tests such as t-test, analysis of variance, correlation or regression, separate estimations of sample size are needed.

### Summary

1. For a descriptive study, the calculation of a sample size largely depends on whether the variable of interest is a mean or a proportion.

2. When the variable of interest is a mean, we need to estimate the population standard deviation, whereas the other values in the formula are fixed.

3. When the variable of interest is a proportion, we need to give an estimate of the expected proportion with such a variable of interest. A conservative approach to this estimate is to give an estimate of 50 percent, meaning that the sample size is estimated in a worst-case scenario.

For a study that may requires inference statistics, the calculation of a sample size may be based on a particular statistical test as needed. 

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## Research Industry News

continued from p. 12

\$0.075 per share, payable on May 17, 1999, to stockholders of record as of May 3, 1999.

**Forrester Research, Inc.**, Cambridge, Mass., a provider of strategic technology research, has announced revenues of \$17.9 million for the first quarter of 1999, an increase of 37 percent from \$13.1 million in the first quarter of 1998. Net income for the first quarter of 1999 was \$1.9 million, a 42 percent increase over net income of \$1.3 million in the same period of 1998. Diluted earnings per share increased to \$0.20 in the first quarter of 1999 from \$0.15 per share in the first quarter of 1998. The agreement value of the company's core research and advisory services increased 49 percent to \$75.3 million at March 31, 1999 from \$50.6 million at March 31, 1998.

**Information Resources, Inc.**, Chicago, announced a net loss of (\$0.3) million, or (\$0.01) per diluted share, for

the first quarter 1999 compared to net earnings of \$1.9 million, or \$0.07 per diluted share, in the first quarter of 1998. For the first quarter ended March 31, 1999, consolidated revenues were \$131.7 million, an increase of 11 percent over the first quarter of 1998. Revenues from the company's U.S. businesses were \$102.3 million, 8 percent above the corresponding 1998 quarter. Revenues from the company's international businesses, primarily in Europe, increased 20 percent to \$29.4 million. Separately, the firm announced that more than 2,500 users at 35 packaged goods companies are now using its InSite Reporting service to access reports from IRI's InfoScan Census sales tracking information service and Shoppers' Hotline household panel.

**I.S.I.S., Integrated Strategic Information Services**, has moved to 2160 Ward Way, Woodside, Calif., 94062. Phone 650-298-8555. Fax 650-298-9555.

**The Kantar Group**, the information and consulting division of WPP Group

plc, has acquired **Center Partners, Inc.**, of Ft. Collins, Colo. The company will form part of the Winona Group, a Kantar company headquartered in Phoenix, Ariz.

Cincinnati, Ohio-based **Sigma: Research Management Group** has launched a new division, Sigma: Online Research Group. The new division will be headed by Jim Wigton, a former market research analyst with Gateway Inc.

**The Gallup Organization** has selected **Optimum Solutions Corp.** (OSC) to continue as its scanning software provider through the year 2001. Gallup originally retained OSC in 1996 to test its application of its FAQSS technology to read surveys and questionnaires. Based on three years of results, Gallup is now committed to using OSC software through 2001.

**Digital Marketing Services, Inc.** Dallas, has formed alliances with Atlanta-based **Elrick & Lavidge Marketing Research** and New York-based **Guideline Research, Inc.** to conduct on-line custom market research via America Online.

Jupiter, Fla.-based research firm **Quick Test, Inc.** has acquired **Probe Research, Inc.**, Dallas.

Moscow-based **F-Squared Market Research + Consulting** has opened a full-service office in Warsaw.

**Northeast Data**, a Wayne, N.J., research firm, has been purchased by Paul Schwartz. Previous owner Leslie Harris will devote full-time attention to his other interest, Focus On Boston.

Effective April 9, the stock of **Opinion Research Corporation** began trading on the American Stock Exchange under the symbol OPI. The Princeton, N.J., firm was previously listed on The Nasdaq Stock Market (NASDAQ:ORCI).

**The Cincinnati Museum Center and SIRS** (Service Industry Research Systems), Highland Heights, Ky., have partnered to create the Family Market Testing Institute (FMTI), a research facility designed to give clients access to



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We're currently planning the next several issues of QMRR and we're looking for research projects in the following areas to profile: packaging research, service quality/customer satisfaction, focus groups, and health care research. If your company or organization has a research project in any of these areas that would make an interesting case history, we want to cover it!

A QMRR writer conducts the necessary interviews by phone and then writes a draft of the story. Because the case histories may touch on sensitive information, we allow interviewees to read a draft of the story before it goes to press. Please contact Joseph Rydholm, QMRR editor, for more information or to discuss a story idea.

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the Center's more than one million annual visitors. The testing facility includes a 290-seat auditorium as well as six focus group or group breakout areas. Part of the proceeds from every project will be shared with the Center's tenants.

**Hispanic & Asian Marketing Communication Research** has opened a Los Angeles-area research complex, featuring a multicultural data collection center, focus group facilities and a CATI center. The complex is located at 1540 E. First St., Suite 200, Santa Ana, Calif., 92701. Phone 714-560-1120. Fax 714-560-1121. E-mail ResearchCenter@hamcr.com.

**Cambridge Focus**, a Cambridge, Mass., focus group facility, reports that it fared well in a recent Impulse Survey on focus group facilities, having been selected as one of the four or five best facilities in North America and the number one facility in Massachusetts. Columbia Focus, Columbia, Md., reports that it received an overall rating of 87 in the Impulse Survey, ranking it as one of the top 29 facilities in North America.

Laurie Ashcraft, president of **Ashcraft Research, Inc.**, and Jim Miller, president of **The Miller Research Group, Inc.**, have formed a partnership called A/M Employee Research Services, a division of The Miller Research Group. A/M will conduct employee attitude and information surveys. For more information call 312-751-5420 or send an e-mail to amsurvey@aol.com. In addition, The Miller Research Group has moved to 350 West Kensington Rd., Suite 109, Mount Prospect, Ill., 60056. The new phone number is 847-342-1500. Fax 847-342-1509. E-mail millerres@aol.com.

**Bay Area Research**, Baltimore, Md., has completed its telephone room expansion at its Randallstown, Md., location. The facility now has 35 telephone lines and offers 35 CATI stations equipped with CfMC technology.

**The Results Network**, Harrisburg, Pa., and its subsidiary, Susquehanna Surveys, have opened expanded facilities featuring WATS and focus group capabilities at 5321-D Jaycee Ave. in the Route 22 Business Center.

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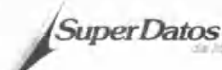
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*(See advertisement on p. 65)*

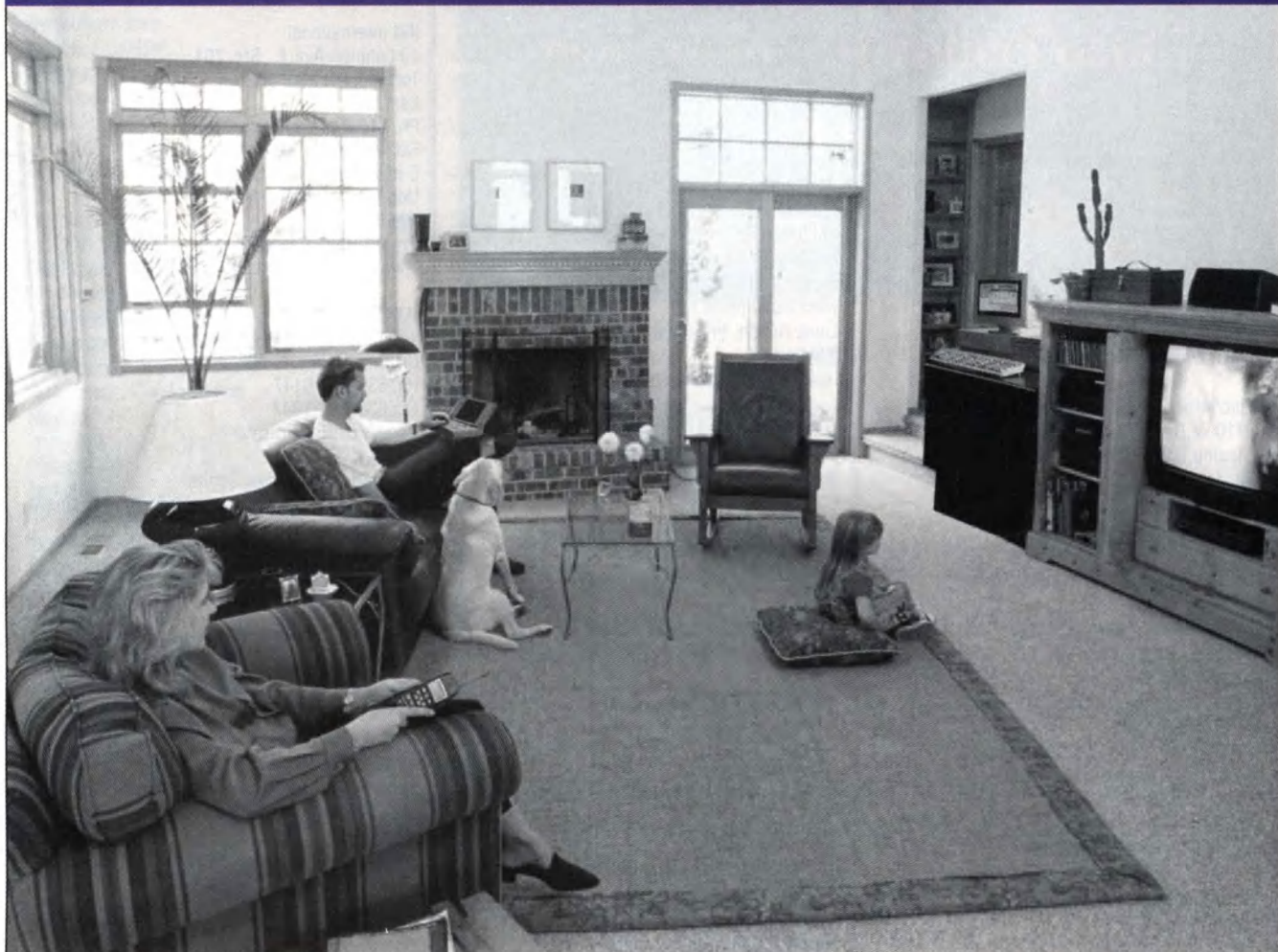
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 Deborah Gonderil  
**Studies:**  
 SRC Hispanic Omnibus TeleNacion

Talmey-Drake Research & Strategy, Inc.  
 100 Arapahoe, Ste. 1  
 Boulder, CO 80302  
 Ph. 303-443-5300  
 Fax 303-447-9386  
 Paul Talmey, President  
**Studies:**  
 Colorado Omnipoll

TARP  
 1300 Wilson Blvd., Ste. 950  
 Arlington, VA 22209  
 Ph. 703-524-1456  
 Fax 703-524-6374  
 E-mail: jgoodman@tarp.com  
 www.tarp.com  
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 Consumer Acceptance of IVR & Internet Svce.  
 Best Process in Service Call Centers  
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 Horsham, PA 19044-0189  
 Ph. 215-442-9000  
 Fax 215-675-9040  
 E-mail: express@intersearch.tnsofres.com  
 www.intersearch.tnsofres.com  
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 Fax 847-564-0834  
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 www.teenresearch.com  
 Michael Wood  
**Studies:**  
 Teenage Marketing & Lifestyle Study

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 Canada  
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 Fax 416-922-8014  
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 www.omnitel.org  
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 New York, NY 10001  
 Ph. 212-695-0066  
 Fax 212-564-1264  
 E-mail: wagnergrp@aol.com  
 Jeffrey Wagner, President  
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 Phoenix, AZ 85016  
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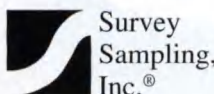
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Marketing Resource Group, Inc.  
NIPO, The Market Research Institute  
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Southeastern Institute of Research (SIR)  
Strategy Research Corporation

## African-Americans

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Market Segment Research  
Marketing Resource Group, Inc.

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Gfk Custom Research Worldwide  
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Issues and Answers Network, Inc.  
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NIPO, The Market Research Institute  
**Opinion Research Corporation International**  
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Market Segment Research

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Market Analysis Ltd.  
Market Trends, Inc.  
Marketing Resource Group, Inc.  
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**MORPACE International, Inc.**  
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**Opinion Research Corporation International**

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NIPO, The Market Research Institute  
Solomon - Wolff Associates  
TARP

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Simmons Market Research  
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NIPO, The Market Research Institute

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IMI International  
Macro International Inc.  
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**Opinion Research Corporation International**  
Roper Starch Worldwide  
Simmons Market Research

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## Consumer-Canada

Angus Reid Group, Inc.  
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IMI International  
IMR Research  
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Roper Starch Worldwide  
Thompson Lightstone & Company

## Consumer-Europe

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CF Group Inc.  
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Macro International Inc.  
MarketResponse International USA, Inc.  
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Roper Starch Worldwide  
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## Consumer-Local

Action Research (VT)  
Behavior Research Center (AZ)  
CF Group Inc. (ON)  
Epic/MRA (MI)  
Gfk Custom Research Worldwide  
IMI International  
Issues and Answers Network, Inc. (VT)  
Market Analysis Ltd. (Greece)  
Market Trends, Inc. (WA)  
Marketing Resource Group, Inc. (MI)  
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Northwest Research Group, Inc. (WA)  
Northwest Research Group, Inc. (ID)  
Roper Starch Worldwide (NY)  
Southeastern Institute of Rsch. (SIR) (DC, MD, VA)  
Strategic Marketing Services (ME)  
Strategy Research Corporation (FL)  
Talmey-Drake Research & Strategy, Inc. (CO)  
WestGroup Research (AZ)

## Consumer-U.S.

Angus Reid Group, Inc.  
Audits & Surveys Worldwide  
Irwin Broh & Associates  
**Bruskin/Goldring Research**  
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CF Group Inc.  
The Consumer Research Network, Inc.  
Custom Research Inc.  
Dittman Research Corp. of Alaska  
Epic/MRA  
HealthFocus, Inc.  
**ICR/International Communications Research**  
IMI International  
IMR Research  
Interviewing Service of America, Inc.  
Issues and Answers Network, Inc.  
**Mature Marketing and Research**  
MRCA Information Services  
NFO Research, Inc.  
**Opinion Research Corporation International**  
Roper Starch Worldwide  
Simmons Market Research  
Solomon - Wolff Associates  
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## Coupons

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Leemis Marketing

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Marketing Resource Group, Inc.  
NIPO, The Market Research Institute

## Direct Mail

IMI International  
Market Facts of Canada  
Marketing Resource Group, Inc.  
MRCA Information Services  
Simmons Market Research

## Entertainment

Audits & Surveys Worldwide  
**Bruskin/Goldring Research**  
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Gfk Custom Research Worldwide  
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IMI International  
Marketing Resource Group, Inc.  
NIPO, The Market Research Institute  
**Opinion Research Corporation International**  
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## Environmental

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Gfk Custom Research Worldwide  
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Marketing Resource Group, Inc.  
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Gfk Custom Research Worldwide  
Market Trends, Inc.  
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## Financial Services

Angus Reid Group, Inc.  
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Macro International Inc.  
Market Facts of Canada

## Market Facts, Inc.

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Marketing Resource Group, Inc.  
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**MORPACE International, Inc.**  
NIPO, The Market Research Institute  
Northwest Research Group, Inc. (WA)  
Northwest Research Group, Inc. (ID)  
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Quadrant Research Services  
Simmons Market Research  
Strategy Research Corporation  
**Taylor Nelson Sofres Intersearch**  
WestGroup Research

## Food/Beverage

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CF Group Inc.  
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Custom Research Inc.  
Gfk Custom Research Worldwide  
HealthFocus, Inc.  
IMI International  
Leemis Marketing  
Macro International Inc.  
Market Analysis Ltd.  
Market Facts of Canada  
Market Trends, Inc.  
Marketing Resource Group, Inc.  
MRCA Information Services  
NIPO, The Market Research Institute  
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Quadrant Research Services  
Simmons Market Research  
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## Gaming

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Market Trends, Inc.  
Marketing Resource Group, Inc.  
NIPO, The Market Research Institute  
Southeastern Institute of Research (SIR)  
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## Health Care/Medical

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Angus Reid Group, Inc.  
Audits & Surveys Worldwide  
Beta Research Corp.  
Irwin Broh & Associates  
CF Group Inc.  
Epic/MRA  
Gfk Custom Research Worldwide  
Issues and Answers Network, Inc.  
Leemis Marketing  
Macro International Inc.  
Market Trends, Inc.  
Marketing Resource Group, Inc.  
MarketResponse International USA, Inc.  
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Medical Data Management, sp.z.o.o.  
**MORPACE International, Inc.**  
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Northwest Research Group, Inc. (WA)

Northwest Research Group, Inc. (ID)  
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Quadrant Research Services  
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IMI International  
Market Trends, Inc.  
Marketing Resource Group, Inc.  
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NIPO, The Market Research Institute  
Rockwood Research Corp.  
Roper Starch Worldwide  
Simmons Market Research  
Solomon - Wolff Associates  
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## Latin America

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Marketing Resource Group, Inc.  
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NIPO, The Market Research Institute  
**Opinion Research Corporation International**

## Media

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**Bruskin/Goldring Research**  
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Gfk Custom Research Worldwide  
Macro International Inc.  
Market Trends, Inc.  
Marketing Resource Group, Inc.  
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## Mothers

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## Office Products

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Simmons Market Research

## Pet Foods

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IMI International  
Leemis Marketing  
NIPO, The Market Research Institute  
**Opinion Research Corporation International**

## Pharmaceutical

Angus Reid Group, Inc.  
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CF Group Inc.  
Issues and Answers Network, Inc.  
Marketing Resource Group, Inc.  
**Mature Marketing and Research**  
Medical Data Management, sp.z.o.o.  
MRCA Information Services  
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**Opinion Research Corporation International**  
Quadrant Research Services  
Roper Starch Worldwide  
Simmons Market Research  
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## Political Affairs

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Market Trends, Inc.  
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Marketing Resource Group, Inc.  
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Macro International Inc.  
Market Analysis Ltd.  
Market Trends, Inc.  
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Leemis Marketing  
Macro International Inc.  
Market Trends, Inc.  
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Simmons Market Research  
Southeastern Institute of Research (SIR)  
Strategic Marketing Services  
WestGroup Research

## Seniors/Mature/Elderly

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The Consumer Research Network, Inc.

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IMI International  
Issues and Answers Network, Inc.  
Marketing Resource Group, Inc.  
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**Opinion Research Corporation International**

## Shopping Malls

Gfk Custom Research Worldwide  
IMI International  
Market Facts of Canada  
NIPO, The Market Research Institute

## Small/Home Business

Gfk Custom Research Worldwide  
NIPO, The Market Research Institute  
Roper Starch Worldwide

## Sports

Irwin Broh & Associates  
**Bruskin/Goldring Research**  
Bruzzone Research Co.  
Gfk Custom Research Worldwide  
**ICR/International Communications Research**  
IMI International  
Market Facts of Canada  
Market Trends, Inc.  
Marketing Resource Group, Inc.  
NIPO, The Market Research Institute  
**Opinion Research Corporation International**  
Simmons Market Research  
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## Technology

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Marketing Resource Group, Inc.  
NIPO, The Market Research Institute  
**Opinion Research Corporation International**  
Roper Starch Worldwide  
Simmons Market Research  
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## Teens

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Gfk Custom Research Worldwide  
**ICR/International Communications Research**  
IMI International  
Macro International Inc.  
NIPO, The Market Research Institute  
**Opinion Research Corporation International**  
Roper Starch Worldwide  
Simmons Market Research  
Teenage Research Unlimited  
Thompson Lightstone & Company

## Telecommunications

Advertising Research Corp.  
Angus Reid Group, Inc.  
Audits & Surveys Worldwide  
**CENTRIS**  
Epic/MRA  
Gfk Custom Research Worldwide

I.S.I.S.-Integrated Strategic Information Services  
 IMI International  
 Market Trends, Inc.  
 Marketing Resource Group, Inc.  
 NIPO, The Market Research Institute  
**Opinion Research Corporation International**  
 Quadrant Research Services  
 Solomon - Wolff Associates  
 Strategy Research Corporation  
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**Textiles**

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 CF Group Inc.  
 Gfk Custom Research Worldwide  
 NIPO, The Market Research Institute

**Transportation**

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 Gfk Custom Research Worldwide  
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 Issues and Answers Network, Inc.  
 Market Trends, Inc.  
 Marketing Resource Group, Inc.  
**MORPACE International, Inc.**  
 NIPO, The Market Research Institute  
 Quadrant Research Services  
 Roper Starch Worldwide  
**Taylor Nelson Sofres Intersearch**  
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**Travel/Tourism**

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**Bruskin/Goldring Research**  
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 Epic/MRA  
 Gfk Custom Research Worldwide  
 IMI International  
 Issues and Answers Network, Inc.  
 Market Trends, Inc.  
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 Marketing Resource Group, Inc.  
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**Opinion Research Corporation International**  
 Quadrant Research Services

Roper Starch Worldwide  
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## Names of Note

continued from p. 8

**Jennifer Suiter** and **Tonia Davis** as usability specialist. At the firm's Council, Idaho, office, **Diane Coon** has been promoted to data collection supervisor.

**Liz Dunn** has joined *Brintnall & Nicolini*, a Philadelphia health care consulting and research firm, as senior research associate.

**Murray Simon**, formerly of *DRS HealthCare Consultants*, has joined the *Qualitative Institute of Strategic Marketing Corp.*, Bala Cynwyd, Pa.,

as senior consultant.

**R. Casey Goodman** and **Andrew Heller** have joined the staff of Atlanta-based *Polaris Marketing Research* as project manager. **Karl Buchholz** and **Stacy Woods** have been named assistant project manager.

**Joseph Durrett**, former vice president and CEO of Broderbund Software, as been named chairman, president and CEO of *Information Resources, Inc.*, Chicago. In addition, **Tim Ruppert** has joined the firm as executive vice president and general manager of its Cincinnati/Minneapolis area.

**Nicholas Holt** has joined *Response Analysis*, Princeton, N.J., as vice president and director of the social and policy research group. In addition, **Lila Goldstein** has joined the firm's telecommunications and information technologies group as senior vice president and group head. In separate news, Response Analysis President **James Fouss** was selected

as the 1998-99 Sigma Chi Foundation/William P. Huffman Scholar-in-Residence at Miami University in Oxford, Ohio.

**Garry Hayles** has been promoted to vice president/controller at *The Eagle Group*, Atlanta.

*CLT Research Associates*, New York, has named the following new staff members: **David Braverman** as senior vice president; **Jan Bell** as vice president; **Nancy Greenwald** as senior project director; **Christina Hildebrand** as project director; **Carolyn Broullon** as field director.

**Merle Sandler** has joined *Pathfinder Research Group*, Acton, Mass., as project director. The firm has also named **Lee Shrier** junior project director.

*Creative Research Services, Inc.*, Atlanta, has named **Mark Oatman** senior vice president and **Dorothea Briggman** project director.

**Coming in  
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## Listing Additions

Please add the following firms to the 1999 Directory of Telephone Interviewing Facilities:

San Francisco Research Service, LLC  
717 Market St., #603  
San Francisco, CA 94103  
Ph. 415-896-2378  
Fax 415-896-2379  
E-mail: sffield@slip.net  
Kevin O'Donnell  
50-50-50-15

Critical Insights, Inc.  
59 Middle St.  
Portland, OR 04101  
Ph. 207-772-4011  
Fax 207-772-7027  
E-mail: mef@criticalinsights.com  
Mary Ellen Fitzgerald, President  
20-20-20-20

Pacific Market Research  
15 South Grady Way, Ste. 620  
Renton, WA 98055  
Ph. 425-271-2300  
Fax 425-271-2400  
E-mail: mrosenkranz@pacificmarketresearch.com  
Mark Rosenkranz, Managing Director  
58-58-58-58

IPSOS-ASI Market Research, Inc.  
11830 Fishing Point Dr., Ste. 215  
Newport News, VA 23606  
Ph. 757-873-6100  
Fax 757-873-6102  
E-mail: jkarson@ipsos-asi.com  
www.ipsos-asi.com  
146-146-146-146

IPSOS-ASI Market Research, Inc.  
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Please note the corrections to the following listings from the 1999 Directory of Telephone Interviewing Facilities:

In the listing for Horizon Research Services, Columbia, Mo., the contact name should be Holly Wygant, Client Relations and Sales Manager.

In the listing for MV2 Conseil, Paris, France, the contact name should be Frederic Penders, Director of International Research.

In the listing for MR&S Market Research & Services, Frankfurt, Germany, the code line for the firm's interviewing stations should read 20-20-0-0.

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## Letters

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unsuspecting customer. Whatever a program is called, therefore, such intentions may place it on the ethical dark side of our industry standards. This is what raised the red flag for us. Our apologies to Rich if his intentions were pure, but the road to research hell may be paved by those who do not see or fail to make such distinctions!

We think his suggestions blur the distinctions between legitimate survey practices and outright marketing to a point that could further increase public cynicism and endanger the effectiveness of marketing research survey techniques.

Alvah S. White  
President, Decision Diagnostics, Inc.  
Evanston, Ill.

William D. Sartain  
Principal, Focused Solutions  
Salt Lake City, Utah

Rich Hebert responds:

In my recent article I stressed the importance of quality customer interactions. Whether an organization is conducting a survey or placing a sales call, the quality of the interaction can affect customer loyalty. High quality interactions are a means of building and enhancing consumer relationships, and, as such, should be considered a loyalty marketing technique. My firm, Sky Alland Marketing, strongly believes that every interaction with a consumer should be treated as an opportunity to build the brand/consumer experience.

Sky Alland is a recognized leader in the customer relationship management field whose methods and techniques have been honed for more than 15 years in a variety of industries. Our company has implemented highly successful dialogue-based market research and loyalty programs for companies like Porsche, Owens Corning, Kohler, Blue Cross Blue Shield, Sears, BMW and other Fortune 1000 companies. As members of the American Telemarketing Association, Direct Marketing

Association, and Society of Consumer Affairs Professionals in Business (SOCAP), among others, we are well aware of the high ethical and legal standards (including privacy) that govern our industry and abide by them at all times.

*(Editor's note: Don Peppers of Peppers and Rogers Group, Stamford, Conn., submitted the following letter in support of Hebert's article.)*

We agree with the basic premise that research and marketing activities should not be mixed blithely, especially when it risks confusing or ultimately alienating the consumer. But with all due respect to Messrs. White and Sartain, they have fundamentally misunderstood Rich Hebert's message. The article isn't about market research — it's about customer research. More specifically, it's about techniques associated with longitudinal surveys of individual customers, as opposed to lateral surveys of market samples in which a sales message would not only push ethical boundaries but would also tend to pollute the data, making the survey less useful.

The surveys discussed by Hebert are designed to create deeper and more fully developed relationships between an organization and its individual customers. These surveys collect relevant information that will lead to specific actions in the near future, such as another follow-up call to ascertain whether the problem was corrected, determine the level of customer satisfaction or suggest a logically related product or service offering.

Those of us involved in customer relationship management believe very strongly that if you ask a customer if he or she is satisfied and take no action in response, you have violated a basic tenet of the buyer-seller relationship.

We agree that market research should not be used as a Trojan horse. But Hebert was writing about developing and cultivating relationships with individual customers through the use of follow-up customer contact. As long as customers are told why the information is being collected and how it will be used (e.g., to provide better customer service in the future), a genuine dialogue can offer measurable benefits for all involved.

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## Corrections

In the editor's note for the article "Image enhancement" (QMRR May) the company description "Ziment Associates, a New York research firm" should instead read "Ziment, a strategic marketing research consultancy headquartered in New York."



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.

## Loyalty article raised red flag

We were disturbed by Rich Hebert's article "From research to loyalty marketing..." in your May issue.

Rich was very careful not to say outright that telephone surveys should be used as "loyalty marketing" devices, but the implications were pretty clear to that effect. This is, potentially, a major violation professional research ethics guidelines. As researchers for almost 30 years we have seen, perhaps as you have, a decrease in response rates for almost all forms of survey work. While some of these response effects are associated with different family structures, new technologies, changing lifestyles, and so forth, others have been the result of public apathy or cynicism toward "surveys" — often exacerbated by telemarketing programs, fake political polling and other forms of pseudo surveying. We should, therefore, vigorously oppose any practices that may further erode the line between legitimate surveys and marketing "programs."

Rich justifies the use of "telephone surveys" with facile and inaccurate arguments about cost and efficiencies, but he's really just setting up the use of the phone for customer contact programs — nothing any good marketer doesn't already know! He then throws a bone to those of us concerned about the line between right and wrong, but he's focused on the wrong line: It isn't, as he points out in the first of his four "guidelines,"

to "Know the difference between customer relationship management and telemarketing"; it is to know (and not ignore!) the difference between the legitimate use of telephone survey techniques for collecting information about and opinions from your customers, and the unethical use of sales, relationship enhancement, telemarketing or other programs in the guise of surveys.

Customer information files, which Rich encourages, are becoming an important marketing tool, and rightly so. However, collecting such information about customers or their habits and preferences for use in such a database through "surveys," where anonymity may be stated or certainly implied, could be a serious ethical breach. We're certainly not advocating that customer service or other associates should never be used to collect customer information, to call back on event satisfaction, to link product purchase to subsequent opportunities, etc. All we're advocating is that marketers be very careful to separate the sales/marketing program from the survey process. The research profession cannot afford the continuing erosion of public confidence in the legitimacy of true surveys.

Why not just change the phrase Rich uses, "telephone surveys," to the more ubiquitous "contact programs," and avoid the controversy? Because in our view, Rich seems to be advocating the use of "telephone surveys" as a cover for marketing programs; trying to slip one by the

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## Dilbert

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