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Marketing Research Review

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March 2000

Advertising research issue

**Chevron tracks
long-running
corporate ad campaign**

**Do you
know these 10
commandments?**

**Focus groups
shape ads for
Federal Duck
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QUIRK'S

Marketing Research Review

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Home decor is a chore

Two-thirds (67 percent) of Americans say that they are unhappy with their home decor — a majority of them grade their home furnishing efforts with just a C+, according to a survey of 1,000 consumers by Furniture.com, a Framingham, Mass., on-line home furnishings retailer.



Compared to their older counterparts, younger and middle-aged consumers (40s and younger) are even less satisfied with their home decor. While less than half (46 percent) of respondents over 50 feel good about taking people on a tour of their homes, they're still more satisfied than younger age groups, where just a third (30-34 percent) would feel good about offering a tour.

The survey found consumers wanting

continued on p. 64

What drives telecommuting?

A survey of over 200 networking professionals conducted by Sage Research, Inc., Natick, Mass., has uncovered the drivers of telecommuting. Telecommuting advocates often cite savings in real estate costs as a key telecommuting benefit. However only 30 percent of respondents agree that telecommuting allows their organization to reduce real estate costs. Based on this study of U.S. organizations, the most widespread driver of telecommuting is that it can be used as an incentive to hire and/or retain skilled workers. In fact, 75 percent of respondents agree that telecommuting allows their organization to retain skilled workers.

With today's low unemployment rates, hiring and retaining skilled workers is difficult. "One of our hypotheses was that organizations use telecommuting as an incentive to attract employees," says David Borden, Sage Research market research analyst. "We were surprised that it was the most commonly cited benefit of telecommuting programs." In addition, employee retention received higher ratings than improved productivity — 63 percent of organizations agree that telecommuting improves worker productivity.

Based on the results, organizations recognize that while some costs (i.e., human resources) are reduced, other costs may stay the same or perhaps even increase. In particular, remote access technology and internal IS support costs increase. Less than 20 percent of organizations agree that telecommuting allows their organization to spend less on LAN infrastructure and reduce internal IS support. In fact, the majority (72 percent) agree that less expensive remote access technologies would promote telecommuting at their organization. These results are available, along with other telecommuting and remote access technology related data, in Sage's latest Reality Check report, "Opportunities in Telecommuting." For more information call 508-655-5400 or send an e-mail to cathyl@sageresearch.com.

On-line apparel shopping hits snags

While more and more consumers are shopping on-line for items such as books and electronics, many retailers are wondering where apparel fits into the picture. According to data from E-BuyersGuide.com, a Burlington, Mass., research service, there are still some serious barriers to overcome before apparel shopping over the Internet is fully accepted.



Data collected from 941 consumers who completed surveys at E-BuyersGuide.com's Web site between January 10 and January 19 indicate that 28 percent of shoppers did not buy apparel on-line because they were unsure about accurate sizing. A further 18 percent were concerned that returning an item could be a problem. Other top reasons cited for not shopping for apparel on-line include quality concerns and delivery costs.

For those who did buy apparel on-line in 1999, low prices (52 percent), free delivery (46 percent), large merchandise selection (42 percent), and ease of return (40 percent) topped the list of most important features when selecting an on-line apparel merchant. Familiarity with the brand/store (28 percent), having shopped at the retailer before (13 percent), and the e-retailer also having a traditional store (10 percent) were less important to e-apparel shoppers.

The data also confirms previous studies by E-BuyersGuide.com: e-mail promotions (34 percent), catalogs (30 percent) and click-through advertising banners (16 percent) were more successful than traditional advertising (TV - 7 percent, newspaper - 3 percent, radio - 2 percent) in encouraging people to make an on-line apparel purchase. The majority of survey respondents were between the ages of 35 and 54 (51.4 percent), female (83 percent) and tend to shop on-line at least once a month (80 percent).

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Names of Note

The Limited, Inc., Columbus, Ohio, has promoted **Brett Polenchar** to director of brand research & analysis.



Polenchar

Serie

Satisfaction Management Systems, Minneapolis, has named **Wayne Serie** vice president and chief financial officer.

Juliet J. Goodfriend, chairman and CEO of *Strategic Marketing Corporation* (SMC), a Philadelphia research firm, has been named the 2000 Paradigm Award winner by the Greater Philadelphia Chamber of Commerce. The Paradigm Award is presented annually to a business-

woman whose outstanding professional and personal achievements serve as a model for success. A nominee is distinguished as an influential executive of a profit-making enterprise with a strong local impact.

Janine Carlson has been named vice president of *Leemis Marketing*, a Chicago research firm.



Carlson

Curtis

Kristin Curtis has been named director of *Focus Portland*, a new focus group facility in Beaverton, Ore.

Henry H. Harteveltdt has been

named senior analyst and will lead the Technographics Travel research group of Cambridge, Mass.-based **Forrester Research**.

Communications Center, Inc., a Lombard, Ill., data collection firm, has promoted **Sascha Vetter** to client services manager and **Pam Bruns** to vice president.

Princeton, N.J.-based *Total Research* has launched its media brand practice, expanding its existing multi-industry brand practice. **Sharon Polansky** has joined the firm as a senior vice president to manage the media brand practice.

Chicago-based *SPSS MR*, the market research arm of SPSS Inc., has named **Richard Scionti** senior director for new business implementation.

Richard Miklautsch has joined Cincinnati-based *Cooper Research* as vice president.



Miklautsch

Henry

Charles Henry has joined Marietta, Ohio-based *Markinetics Inc.* as a senior consultant.

Larry Rosinski has been named market research and planning manager at *Land Rover North America*, Lanham, Md.

Frances Grubb, president of *JRA*,

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Teen omnibus now available on AOL

Lewisville, Texas-based research firm Digital Marketing Services, Inc. (DMS), a division of America Online, Inc., has launched its Opinion Place Kids & Teen Omnibus Survey on America Online. The survey allows marketers to assess the aggregate behaviors and interests of kids and teens through a shared on-line survey combining the questions from multiple marketers into a single survey. As with all Opinion Place youth surveys, Opinion Place Kids & Teen Omnibus requires parental permission and is fully compliant with Federal Trade Commission children's on-line privacy regulations, as well as AOL's privacy policy. The monthly survey is answered by 1,000 boys and girls, ages 7 to 17, among a national sample of

randomly selected Opinion Place visitors. DMS separates each marketer's results and delivers the information within 10 days of question submission. Incentives to complete surveys are provided through DMS' umbrella program, AOL Rewards. Participating AOL members, now including kids and teens, can earn AOL Rewards points toward AOL fees, books, electronics, travel, software and more. For more information call Shelly Bracken at 972-874-5080.

Total Research debuts on-line brand equity product

Total Research Corporation, Princeton, N.J., has launched EquiTrend Online, a measurement of brand equity that utilizes Internet tech-

nology to provide an immediate, in-depth survey of 30,000 Internet users on their perceptions of the quality of 1,200 brands across 21 categories. EquiTrend Online builds on the brand equity database that Total Research has collected during the 10 years of its EquiTrend survey of consumer brand perception. In conjunction with the launch of EquiTrend Online, Total Research will initiate the EquiTrend Online Annual Awards Program. Each year, the brands with the highest brand equity ratings will receive nationwide recognition. For more information visit www.totalres.com.

Update of Remark Web Survey now out

Principia Products, Inc., a Paoli, Pa.,

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pearls of wisdom

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Andrew Jeavons, former president of **Surveycraft Systems Inc.**, and Ed Ross, founder and former chairman of **Quantime Ltd.**, have founded **OpenSurvey**, a non-profit organization dedicated to the development, discussion and distribution of open source software and open standards for survey research. OpenSurvey will also serve as a forum for the debate of any issues relating to survey software and open standards within survey research, both commercial and non-commercial. OpenSurvey aims to facilitate the development of a core tool kit of open source software for use within survey research (see www.osf.org for a more detailed discussion of open source software). OpenSurvey will also assist and initiate the development of open standards for the survey research industry. OpenSurvey will be made possible by donations of funds or resources from the survey research community. Initially the Technical Council that will guide OpenSurvey will comprise Jeavons, Ross, and William Connett, director of computing at the Institute of Social Research, University of Michigan (www.isr.umich.edu). The membership of this council will increase as OpenSurvey develops. For further information or pledges of funds and/or resources contact andrewje@one.net or esr@edross.com or visit www.opensurvey.org.

Data Based Marketing, a San Luis Obispo, Calif., marketing agency specializing in credit unions, is now offering Web-



MARKET RESEARCH SOCIETY CONFERENCE: Britain's Market Research Society will hold its annual conference on March 15-17 at the Brighton Metropole, Brighton, England. For more information visit www.marketresearch.org.uk.

SAWTOOTH SOFTWARE CONFERENCE: The eighth Sawtooth Software Conference on Acquisition and Analysis of Market Research Data will be held March 21-24 at the Hyatt Regency in Hilton Head, S.C. Scheduled speakers will cover topics such as conjoint/choice analysis, Web-based interviewing and classification/segmentation algorithms. Speakers have been challenged to emphasize practical rather than theoretical topics. Prior to the general session, tutorials will be offered on market research over the Internet, Hierarchical Bayes, using SPSS and SAS software, and an introduction to CBC. For more information call Marilyn Stanford at 360-681-2300 or visit www.sawtoothsoftware.com.

IRI ANNUAL CONFERENCE: Information Resources Inc., Chicago, will hold Consumer Connection 2000 on March 19-22 in Orlando, Fla. Program topics include e-commerce initiatives, changes in the global retail environment, category management and shelf space management, and new ways to manage new product launches and consumer-driven programs. For more information call 312-726-1221 or visit www.infores.com.

AUTOMOTIVE BRANDING CONFERENCE: Marketec Systems, Inc., Allison-Fisher, Inc., and McKinsey & Company are jointly presenting "New Insights Into Automotive Branding," on March 30 at the Westin Hotel, Long Beach, Calif. Topics include 3D brands, a proposal for new brand metrics, and the Internet and commoditization of brands. For more infor-

mation visit www.marketecsystems.com/conference.htm.

AMA RESEARCH EVENT: The American Marketing Association will hold its Applied Research Methods conference on April 2-5 at the Hyatt Lodge - Hamburger University - Oak Brook, Ill. For more information visit www.ama.org.

FOCUS GROUP BOOT CAMP: On April 7, the Greeley Institute will present a "Focus Group Boot Camp," a one-day workshop for managers who use or authorize use of focus group research. For more information call 800-934-8125.

INTERNET CONFERENCE: The European Society for Opinion and Marketing Research (ESOMAR) will hold Net Effects 3, its worldwide Internet conference, on April 10-12 at the Burlington Hotel in Dublin. For more information visit www.esomar.nl.

CANADIAN RESEARCH SOCIETY COURSES: On April 13-14, the Professional Marketing Research Society (PMRS), North York, Ontario, will present a course entitled "Marketing Management for Researchers," which is designed to give participants a comprehensive understanding of the marketing function. On April 17, the PMRS will offer a course entitled "How to Measure Customer Satisfaction, Loyalty and Retention." The April courses will be held at the Corporate Seminar Centre in Toronto. On May 1, 8, 15, and 20 PMRS will hold a four-day course called "Fundamentals of Marketing Research." This course will be held at the Board of Trade in Toronto. For more information call 888-815-PMRS or visit www.pmr-s-aprm.com.

CONGRESS FOR MARKETING, AD EXECS: The International

Communications for Management Group will hold the SMART 2000 Strategic Marketing & Advertising Congress from April 14-16 at the Banff Springs Hotel and Resort in Banff, Canada. The Congress offers senior marketing and advertising executives a chance to interact with their peers through a variety of seminars, think-tanks, one-on-one pre-

based surveys. For more information visit www.dbmkt.com/future.

GroupNet, a national alliance of 25 independent focus group facilities, has joined the videoconferencing network of **FocusVision Worldwide, Inc.**, Stamford, Conn., to offer an expanded package of videotransmission services. FocusVision will manage all aspects of videotransmission services for GroupNet, including project coordination, technical support, and sales and marketing.

Fairfield, Conn.-based **The Kantar**

scheduled business meetings, receptions and other activities. Keynote presenters at SMART 2000 include commentator Jaclyn Easton, Karen Edwards of Yahoo! and Warren Kornblum of Toys 'R' US. For more information on this complimentary event contact Paul Ferreira at 416-955-0375 ext. 5639 or at paulf@icmto.com.

Group, the information and consultancy division of global marketing services group **WPP**, has announced the merger of two of its companies, **Research International USA** and **The Winona Group**. Under the name Research International, the new firm will form part of the Research International Group. The merged firm will be headed by Alex Vayslep, CEO of Research International USA.

Kennebunk, Maine-based **Digital Research, Inc.** has acquired **Davidson-Peterson Associates, Inc.** (DPA), a travel, tourism, and hospital-

ity research firm also based in Kennebunk. Karen Peterson, formerly president of DPA, will stay with the firm as managing director.

Opinion Research Corporation, Princeton, N.J., reported that revenues from its Internet-related activities around the world totaled \$6.6 million in 1999.

The Arbitron Company, New York, has released Webcast ratings for the month of November 1999, extending its broadcast-style audience measurement to an additional streaming media provider, Access 21. The November edition of InfoStream compiled listening estimates for over 850,000 listeners. The second report included 255 channels of audio programming offered by six participating streaming media services — ABC Radio Networks, Access 21, BroadcastAmerica.com, LaMusica, Magnitude Network, and

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Hierarchical Bayes:

Why all the attention?

By Bryan Orme

Editor's note: Bryan Orme is vice president of Sawtooth Software, Inc., Sequim, Wash. He can be reached at 360-681-2300 or at bryan@sawtoothsoftware.com. The author wishes to thank Richard M. Johnson for his helpful comments and technical papers on Hierarchical Bayes that made this article possible.

If you've been to a technical market research conference lately, you've likely heard presentations advocating a technique called Hierarchical Bayes estimation (HB). The possible applications for HB are far-reaching. If there is heterogeneity among individuals, HB can significantly improve upon traditional aggregate models such as OLS regression or logit for conjoint/choice analysis, customer satisfaction, brand image studies or any other situation in which respondents provide multiple observations.

Until recently, the individuals advocating HB were academics and a few practitioners expert in statistics. HB is demanding both in terms of computational time and complexity. For realistic market research data sets, the run times were counted in days rather than minutes or hours. Given that no easy-to-use HB software existed and com-

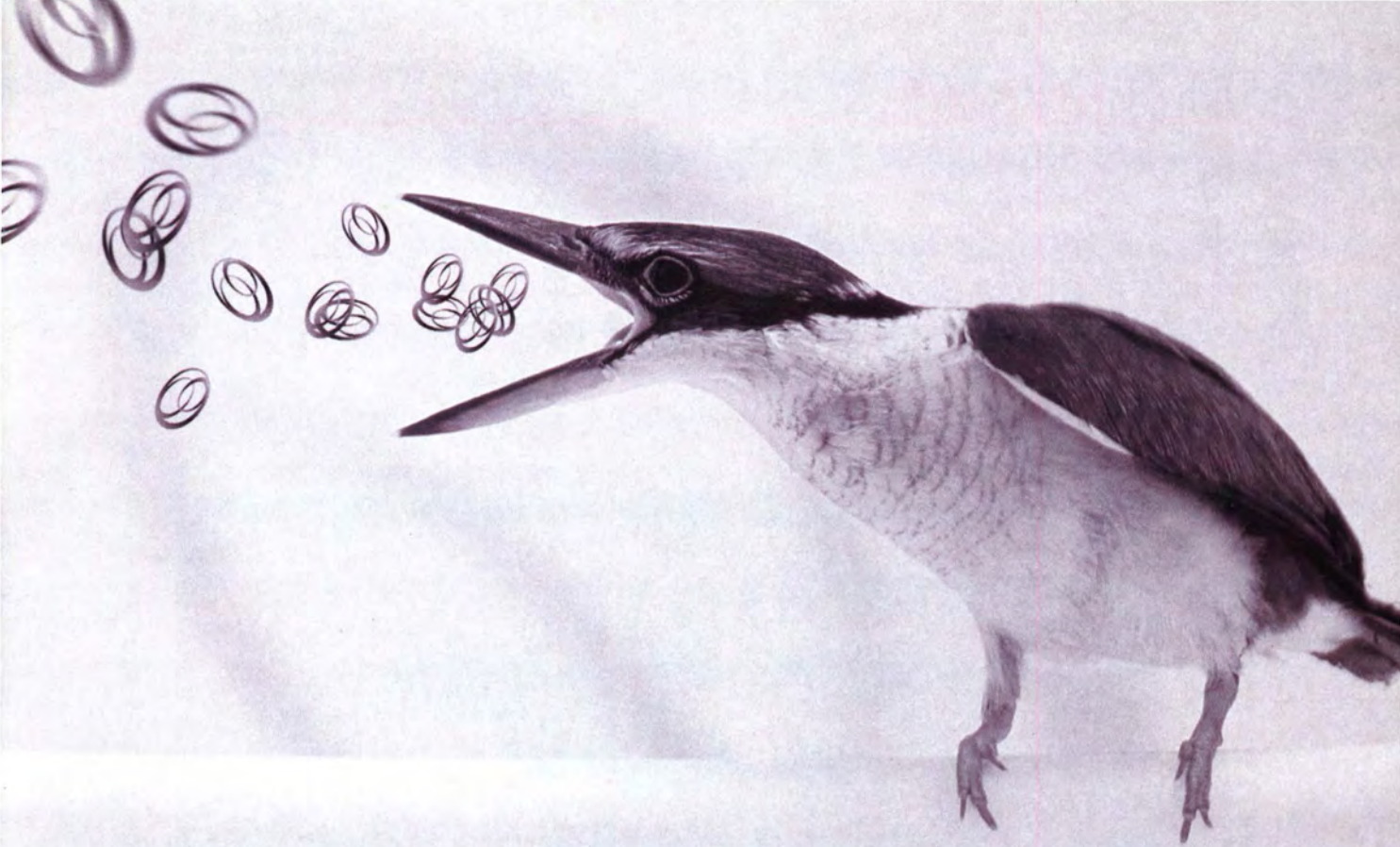
puters were not fast enough to deal with real world problems in a reasonable time frame, it is not surprising that some practitioners were skeptical of HB and the hype surrounding it.

Until recently, we too at Sawtooth Software were doubtful that HB would soon achieve very widespread use in the marketing research community. But recent advances in the processing speed of PCs have exceeded our expectations and knowledgeable academics such as Greg Allenby of Ohio State have taught tutorials, published algorithms on HB estimation, and have supported the efforts of individuals such as ourselves in creating off-the-shelf HB software.

What is Hierarchical Bayes?

The Hierarchical Bayes model is called "hierarchical" because it has two levels. At the higher level, we assume that individuals' parameters (betas or part worths) are described by a multivariate normal distribution. Such a distribution is characterized by a vector of means and a matrix of covariances. At the lower level we assume that, given an individ-

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Preserving the



preservationists

Focus groups shape ads designed to expand market for Federal Duck Stamp Program

By Joseph Rydholm
QMRR editor

In many ways, it's a common marketing situation: a manufacturer faces dwindling sales of a venerable product due to a shrinking core market; an ancillary market holds some promise but its growth potential is hindered by pricing issues.

In other ways, it's almost unique: most of the people who buy the product do so because they have to, not because they want to; and most of them have no idea what the product is used for.

Then there's the product itself: duck stamps.

Duck stamps? Well-known to duck hunters and stamp collectors, the U.S. Fish and Wildlife Service's Federal Duck Stamp Program has, since 1934, helped fund the preservation of over five million acres of wetlands in the U.S. Unlike many government programs, this one is a model of efficiency: well over 90 percent of its revenues go directly to the purchase and preservation of wetlands. The rest is used for production and distribution of the stamps.

Known in official parlance as Migratory Bird Hunting and Conservation Stamps, duck stamps are a required annual purchase for duck hunters. (Most hunters say they have little idea of what duck stamp fees are used for. They just know that you have to buy a stamp if you want to hunt ducks.) But the number of hunters is decreasing, and though the stamps are sought after by collectors, their hefty price (last year's stamp was \$15) makes accumulating them an expensive proposition for the garden-variety philatelist.

"We needed to find a way to reach a new audience, to broaden our market, as with any product," says Margaret Wendy, manager of sales and marketing, Federal Duck Stamp Office, Department of the Interior, U.S. Fish and Wildlife Service, Washington, D.C.

So the government has embarked on a test print and TV ad campaign appealing to conservation-minded individuals by offering them a chance to preserve wetlands simply by purchasing a duck stamp. For \$30, they receive a certificate (bearing a duck stamp) which

proclaims that their money has gone to preserve 1/10 of an acre of wetlands. "We're hoping to attract bird watchers, hikers, and others who understand what is happening to wetlands but don't know that there is a way that they can easily and cheaply do something to help," Wendy says.

Focus on the stamp

Initially, the idea was to focus the marketing campaign on the stamps themselves, their beauty and the value of collecting them. But in focus groups conducted during the development of the campaign by The Ball Group, a Lancaster, Pa.-based research and

environmentally active but who were not predisposed against environmental issues. (In addition, a telephone survey with a random national sample was conducted to determine awareness of the Duck Stamp Program and to gauge interest and participation in environmental issues.)

As part of a process The Ball Group calls Creative Regression Analysis — which is designed to identify the creative appeals and support factors that create a sale — a range of creative appeals was tested in the focus groups, including: buying the stamps as a way to save the environment; buying and collecting them as a form of investment;

Since 1934, the Federal Duck Stamp Program of the U.S. Fish & Wildlife Service has acquired more than 5 million acres of natural wetlands, saving them from destruction and preserving them as a national resource for generations to come.

www.duckstamp.com
1-800-DUCK-499

Something in return: The idea for the certificate grew out of research findings that consumers weren't motivated purely by the desire to preserve a valuable resource. They wanted a way to show friends and relatives that they were environmentally-aware.

advertising firm, the stamps themselves weren't enough to make the sale. "The collecting aspect was of minimal interest," says Wes Ball, the firm's president. "People are more interested in saving Beanie Babies."

Hence the certificate idea, which came directly from research. More on that later.

Focus groups were held in cities around the country, two groups per city, one with environmentally active people and the other with people who were not

and giving stamps as gifts to friends or relatives interested in stamp collecting or in preserving the environment.

Each appeal had its own set of possible approaches. For example, in testing the environmental appeal, tacks included playing off respondents' fear of unchecked development, extinction of animals that live in the wetlands, and contaminated water.

"After the initial discussion about

continued on p. 74



For the past 15 years, Chevron Corporation has been doing the impossible: proving to consumers that the phrases “major oil company” and “environmentally sensitive” belong in the same sentence.

Through its long-running print and TV campaign, called “People Do,” the firm has highlighted its efforts to preserve and protect the environment near its facilities around the world. The ads appear in markets in which Chevron is a gasoline marketer or has production

or exploration facilities, chiefly California, Texas and parts of Florida.

Rather than trumpet a broad “we care about the environment” message, the ads take a case history approach, relating specific stories of the firm’s environmental activities.

The print ads are subtle. For example, the copy for the ad “The Wetlands That Almost Disappeared” reads:

“In southern Louisiana, a vital wildlife breeding ground was endangered. Freshwater wetlands were vanishing. Leveeing along the Mississippi

River had reduced the influx of fresh water and silt. But then, people working nearby partnered with the Fish and Wildlife Service to carve channels into the levees. Hundreds of acres in the Delta National Wildlife Refuge were restored. And so was nature’s glorious nursery.”

Only a Chevron logo following the text indicates who the “people” referred to in the copy are.

The firm had a sense that the case history approach was the way to go, and the research it has conducted dur-

Campaigning for the outdoors

*Chevron tracks long-running
corporate advertising
program*

By Joseph Rydholm
QMRR editor

ing the campaign's life span, with the help of Communicus, a Santa Monica, Calif., research firm, has shown that instinct was right. "We know from the research that specific stories about what we do are more effective than anything about the general philosophy of the company," says Lewis Winters, manager of opinion research, Chevron



Corporation, San Francisco. The research has shown that deviating from that approach, even with similar, environment-related messages, isn't as effective. "There were some attempts to move out of that mode and perhaps involve fewer examples of wildlife and focus more on things like our tank integrity program, which entails putting double-hulled tanks under the gas stations," Winters says. "Those

tended to not be as effective in the Communicus procedure in conveying our environmental concern, even though they are obviously important programs.

"It's interesting that things we spent an awful lot of money to do — such as making our refineries more environmentally friendly — if you try to advertise them, consumers don't give you as much credit as some less expensive thing you might do to convey your

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Editor's note: Tim Huberty is president of Huberty Marketing Research, St. Paul. He can be reached at thuberty@uswest.net

We're all familiar with retailer John Wanamaker's famous quote which introduces the advertising chapter of countless marketing textbooks: "Half the money I spend on advertising is wasted. I just wish I could figure out which half."

If Mr. Wanamaker — or any of us — could figure out the answer to that ageless question, we would attain enlightenment. Marketers and advertising agencies have grappled with this conundrum since form was created out of chaos. Even the prophets in the Old Testament oftentimes didn't know how much of a good thing was too much as they stumbled around the countryside touting the message of the Big Guy.

A company throws its advertising message out there and then — poof! — it's gone. So after paying the bills, clients are left wondering: Do I get any reward — earthly or otherwise — for that? Are there better, i.e., more cost-effective ways, of getting that same message out to more people for less money?

One of the problems with advertising is that one only rents awareness. So you can't be too sure if you're spending too little, the right amount, or too much.

The ultimate gospel of marketing efficiency is sales. But, as we all know, marketing is the "big picture" strategy of selling products and services, whereas advertising is one tactic, one of many tools which may lead to eternal salvation. Marketing includes deals cut in the back room, the cents-off coupons from Sunday's newspapers and even the public relations fluff which keeps cropping up on the nightly news. It's easy to measure the impact of marketing — look at the bottom line. On the other hand, it's not so easy to measure the effectiveness of advertising. After all, over the last two millennia one thing we've learned is that people don't behave the way you expect them to just because you tell them to.

But do not despair, seekers of the truth. There is a tried and true way of measuring advertising effectiveness, merely by living The 10 Commandments of Advertising Tracking.

1. I am the Lord God of Advertising Tracking; thou shalt not have strange objectives before me.

When it comes to tracking the effectiveness of advertising, track the effectiveness of advertising. Nothing else. Nothing is (more) sacred. More often than not, advertising tracking gets polluted by other false gods. Last year, I did a project for a chain of restaurants. In one study, my client wanted to figure

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out the one unique, distinguishing characteristic that makes a customer come back or not come back to the restaurant. He also wanted potential customers, current customers and past customers to grade the food, to tell us where they would have gone if the restaurant had been closed, to tell us why they do or don't use takeout. To top it all off, the client added, "And, oh by way, we ran some radio and billboards. See if the advertising is working."

This is not the way things are done! Advertising should be its own unique study, its own unique survey. No "false objectives" please. To want to do otherwise is promulgating heresy!

2. Thou shalt not take the name of quantitative tracking in vain.

Advertising is measured quantitatively, not qualitatively. Advertising is measured among the faithful or soon-to-be faithful, not among a select group of opinionated Pharisees who sound like a clanging cymbal. "Getting feedback" from focus group

participants is another one of those add-ons which frequently soils a discussion guide. Focus group participants should never be entrusted to provide advertising recall. More often than not, participants cannot remember any advertising, let alone your advertising. (Rule of thumb: Consumers always remember humor — but that's a topic for another article.) And, the opinions of those consumers are not projectable. It's "group think," the blind leading the blind. Focus groups are for getting guidance before producing creative, not after it.

3. Keep holy the start of the advertising campaign.

Advertising tracking is done before the campaign begins, not after it's been out there for a few months, a year or two or even a decade. You have to know the awareness level and attitudes toward your products and services before you start tempting the unwashed with advertising messages. It's really a huge waste of money to track the effectiveness of an advertis-

ing campaign which is "old news." After all, follow the example set by the Original Campaign. God began with a clean slate and only began chalking up saints and sinners after the First Couple had succumbed to the serpent's Original Advertising Message. Tracking a campaign after it begins can only lead to two catastrophes: The numbers can be low/high (take your pick) and the client will be excited/disappointed because he has done so well/poorly. Unfortunately, no person, no matter how holy, has any idea if the numbers have declined/increased, because you never knew if they were high/low to begin with.

4. Honor thy telephone.

Advertising is tracked with a telephone and by an interviewing minister. It is an methodological mortal sin (not a mention a waste of money) to send consumers a mail survey — where they can sit and mull over their answers or even "study up" before recording results. A personal interview isn't much better due to the myriad of other distractions respondents face. Once upon a time, I was working on a liquor account and ventured out into the wilderness with several liquor ads — with the client's name blotted out. Sure enough, consumers recognized that the client's name had been blotted out.

Instead, "hit 'em where they live" — at home, with the phone. That's the place where they make their faith commitments anyway.

5. Thou shalt not stop with "phantom awareness."

Basically, tracking advertising involves a trinity of questions which form the basis of the three types of advertising awareness: phantom awareness (good), prompted awareness (better) and proven awareness (best). Here's your first question — pure, plain and profitable:

Let's talk for just a minute about advertising. Do you recall seeing or hearing any advertising about (INSERT PRODUCT OR SERVICE HERE)? This would include any type of advertising such as television and radio commercials, newspaper ads,

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This is just a yes/no question. Nothing too complicated. Nothing too threatening. A "simple commitment" will do. You don't want to spook the consumer with the first question.

The question includes several kinds of media. I have found that when people hear the word "advertising" they only think of television advertising. So you have to remind them of all the near occasions of sin.

Of course, this is a question which everyone can answer — and most will. No one wants to appear stupid when talking to a stupid marketing research interviewer. So, people "pretend" awareness — a venial sin for sure. So this number is really a phantom number and isn't worth a whole lot, except that it forms the base from which all the wheat is separated from the chaff. Any respondent who cannot answer this question is spared the next few questions and is shuttled immediately to the limbo of the demographic questions.

6. *Thou shalt not commit adulteration. Thou shalt prove that thou hast seen the Light.*

The next two questions, by far, are the most important. They are the questions which actually determine whether or not the advertising is working. Together, they make up "proven advertising."

FOR EACH RESPONDENT WHO CLAIMED AWARENESS, ASK:

- Please describe that advertising to me. **PROBE:** Anything else?
- Who was the sponsor of that advertising?

Within these open-ended questions, respondents have to prove that they actually remember the advertising. No fibbing here; it's time to step up to the altar. No open-ends were ever more important to you and your money. The respondents have to come up with something specific. And then, just as important, they have to come up with your name.

How do you compute "proven awareness"? How do you distinguish the Saved from the Sinners? You begin with the congregation of "yes men" from the previous question. If they

What makes people do what they do?



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cannot name something specific that proves they saw/read/heard the ad, they are terminated. Cast out, nothing short of eternal damnation awaiting them.

But consumers not only have to come up with a specific executional element and/or salvation message, they also have to know who their Savior is. However, do not despair. The Sinners only go to Tracking Study Purgatory; they will still get a second chance.

Proven awareness is, far and away, your most important figure, since it includes only those who had made the Faith Commitment, who can actually prove that they know your advertising. Isn't this really what you're on this earth for anyway?

Actually, "many are sent, few are remembered." It is extremely difficult for people to specifically remember anything about any ads, since, as we've all read, consumers are bombarded with 50 gazillion advertising messages a day. One of the highest levels of proven advertising aware-

ness I have ever seen was for a bank campaign. A national bank based here in the Twin Cities used Bob Newhart as a spokesman for many years. And yet, when asked to describe bank advertising they had seen or heard, only 18 percent of that bank's customers spontaneously mentioned Bob. So, everything — including

especially if you're put on the spot. So, just like any religion worth its weight in sinners, we have to give consumers a second — and a third, and a fourth — chance. So we've created prompted awareness. Just like grace, this is actually good stuff, but it's just not as sanctifying as proven awareness.

FOR EACH RESPONDENT WHO CLAIMED AWARENESS, ASK:
Now I'd like to ask you some specific questions about this advertising. After I read each item, please tell me whether or not you have seen or heard this advertising.

READ SCENARIO. ROTATE ORDER.

SCENARIO AWARE			
A	INSERT SPECIFIC EXECUTIONAL OR MESSAGE ELEMENTS	Y	N
B	" "	Y	N
C	" "	Y	N
D	" "	Y	N
E	" "	Y	N

proven advertising awareness — is relative.

7. *Thou shalt be prompted.*

An important message bears repeating: It is extremely difficult to remember anybody's advertising —

As shown above, you want to tempt the consumer with between eight and 10 executional and message prompts from actual ads, taken from all media used. You might want to stick in elements and messages about your competitors' ads too, just to keep things interesting.

Prompted awareness is OK, but it's not the not key to eternal life. Consumers can delude advertisers with claims of awareness. Hey, consumers do lie. And here, once again, the numbers can be good — or bad. For example, in a project I recently conducted, 45 percent of a target audience remembered seeing or hearing an ad for the Minnesota Office of Environmental Assistance — before the campaign even began.

8. *Thou shalt covet thy neighbor's advertising.*

Both proven and, especially, prompted awareness provide great opportunities to throw in some of your competitors' ads, just to see how well they are — or are not — doing. We can only measure how good we are by measuring how good they are. Advertising isn't done in a Garden of Eden. We're only as saintly as the sinners — or vice versa.

This is also an excellent chance to compare the cost-effectiveness of your advertising vs. theirs. This is the time to have the media priests and

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priestesses compare what you paid for your awareness vs. what they paid for theirs. Once upon a time I worked on an account for a manufacturer of tennis balls. I always let the client beat his chest over the fact that the advertising awareness of his tennis balls was twice that of his closest competitor. I never did have the courage to remind him that he spent 10 times more on advertising than that same competitor.

9. Thou shalt bear true witness for attitudes and behaviors.

Advertising is more than just remembering clever messages and ingenious executions. After all, if that were so, all those award-winning hot-shot ad agencies would hold onto all their accounts forever. But advertising is more than memorable snippets, it's also about changing attitudes and behaviors. It's about saving the unenlightened, even if they don't know what got them saved.

With that in mind, it should be second nature to include attitudinal statements and behavioral questions in an advertising tracking study questionnaire. I had a client whose advertising was pretty staid (read: boring). Yet, over time, when prompted, current customers and potential customers rated the client's product higher. More importantly, their purchase intent increased significantly. And yet, awareness of the client's advertising remained lower than the Dead Sea. Maybe the advertising somehow had an impact upon that shift. Who knows? The ends justify the means.

10. Thou shalt track thine advertising on a regular basis.

Perhaps what frustrates me most is the large number of clients who cannot be convinced of the importance of tracking their advertising on an ongoing basis. Salvation isn't a one-time occurrence. One always has to be wary of backsliding. "It's an investment," I preach. "Think of how much you paid to produce the ads. Don't you want to know what your ROI is?" Oftentimes, clients can be convinced to monitor their advertising once, and


sometimes even twice. But then they resort to their old habits and fall into untracking ways. Maybe they get distracted; maybe they get bored. But little do they realize that certain hell-fire and damnation is just a short step away.

Tracking advertising, like the advertising itself, is a long-term commitment. The advertising must be tracked at periodic intervals. On a consistent basis. And definite money should be budgeted at the start of the advertising to continue the monitoring. We worship on a fairly regular basis, to keep on the straight and narrow. But unless one is ever-vigilant, a competitor may be tempted to come and lead some customers astray. And, chances are, if we're not watching, we wouldn't even know about it.

Revelations 1:1

Following these 10 commandments should keep you in the state of grace for a long time. These rules should tell you to follow the current campaign or to search out another prophet (profit?). They should tell you when to give thanks to your agency, to repent for selecting a strategy or even when to call down the wrath of God when consumers start flailing after other golden calves.

Although I've made a valiant attempt, proselytizing can only go so far. I know there are a lot of doubters out there who really want to believe, but they need a good example to convert them, to put them on the stairway to heaven. I know I'm preaching to a tough crowd, one that's paid to be cynical. So, I invite anyone from this unconvinced contingent to e-mail me and I'll send you a copy of an actual tried-and-true advertising tracking study questionnaire.

Tracking advertising isn't as fulfilling as copytesting, but it won't get you martyred either. So when Judgment Day comes, it pays to have these commandments in your hip pocket. After all, advertising tracking leads to information, which leads to power, which leads to the opportunity to live the One True Tenet of Marketing Enlightenment: "Recommend more research!" 



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A statistical approach to security/past participation problems

Do market research in the market

By Herb Sorensen

Editor's note: Herb Sorensen is president of Sorensen Associates Inc, a Troutdale, Ore., research firm. He can be reached at herb@sorensen-associates.com.

For many years, the twin guards of integrity at the doors of market research have been security and past participation screening of respondents. Both are geared to eliminate the "wrong" kind of respondent from research studies: security to eliminate competitive leaks; and past participation to eliminate "professional" respondents — those who are too familiar with the research process. On reflection, these two screening criteria are closely allied.

Regardless of the merits of this or that approach to security and past participation, long-standing suspicions

and anecdotal reports of failures of these twin guards have recently been confirmed by solid research. Careful studies demonstrate that less than 5 percent of the population produces more than half of all the responses used in market research (Bickart and Schmittlein, *Journal of Marketing Research*, May 1999).

One response to plummeting cooperation rates by consumers has been to try to educate and persuade the public that their self-interest is involved in market research; as well as to identify consumer-friendly research practices (CMOR, see www.cmor.org/cmorrespach.htm). Another is to conclude that past participation doesn't matter and to accept "professional" respondents as the norm. This latter position has been given powerful impetus by the on-line survey community, who tout

huge respondent panels but are in fact repeatedly surveying what must be a very small slice of their panels. A minimum of monthly surveys are recommended by these practitioners, and some of their respondents are actually being queried multiple times per week!

However, it is not necessary to acquiesce to the slumber of the sleeping guards. Both security and past participation criteria can best be attained through a sensible statistical approach. Some caveats and observations are appropriate:

1. Absolutely secure consumer research is very nearly an oxymoron. "You mean you want me to find out what a thousand people think about this new idea, but you don't want anyone to know about it?"

2. Standard security questions on

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intercept screeners are probably nearly worthless. The very people you most want to eliminate from a study are the ones most likely to misrepresent themselves in order to get access to the study. Reporting on a recent

MRA/QRCA discussion and study in the July 1999 issue of *Quirk's*, Joseph Rydholm noted that: "While the exact scope of cheating/repeating is tough to quantify, anecdotal evidence suggests the problem is common."

3. Several years ago a major packaged goods company was conducting a "highly secure" study on the eastern seaboard. Research facilities were carefully selected and audited for security to assure the tightest possible restrictions. All evidence suggested that these precautions were effective, until the firm's own sales manager in one region submitted a detailed report on the new concept. No one in the sales chain (including this manager) was privy even to the existence of the research. This manager's wife, by chance, had been asked to participate in the study and provided the details for the report, making it appear the firm had stumbled onto some major competitive initiative.

4. Approximately 10 percent of the staff of our firm has access to studies fielded through the largest mail panel company in the country. This is through mothers-in-law, wives, etc. A client who works with us regularly felt that they needed the "added" security of a mail panel for a sensitive new product concept. We, of course, were unaware of the study's existence until we received a full set of the survey materials through one of these back-door sources. It's hard to tell whether the client was glad to learn of this lapse, or preferred to bury it and continue to pretend that they were operating with very tight security.

5. Anytime you interview at a site that is frequently used for market research, by yourself or others, you can be sure you are getting a lot of "professional" respondents. The field services are glad to get these people. They cooperate to fill any quota and are skilled at cheating on security and past participation questions. Reuse of the same site over and over by the research community is guaranteed to produce this problem. One facility in the New York metro area (operated by one of the largest field service chains) is so large that one might conclude that they are an anchor for the mall. (The same principle operates but is controllable in an ethically operated mail panel. By the way, who is independently checking these panels?)



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This is just a brief overview of potential and actual security and past participation problems.


The statistical approach to security recognizes that we are unlikely to reduce potential lapses to zero. The method depends on decreasing the odds that undesired parties will accidentally get involved in a research study; and insuring that we will have access to as wide as possible a sampling of our target market.

Begin by thinking about where you plan to conduct your next survey. OK, how many other researchers, possibly competitors, are planning to go to the same place (site or list) for their studies? Rule #1, you shouldn't be there.

This rule has been virtually ignored by the research industry for decades. Rather, access to respondents has been organized to facilitate the production of large quantities of data in a milieu convenient to the researchers. For the most part, this means data collection occurs in an office environment: the mall "office," the telephone center "office" or the post "office."

Why not do your market research in the market where you sell your goods? There you would likely avoid competitive security interests, as well as the pesky "professional" respondent. This would require working evenings and weekends in retail stores to meet the shoppers and avoid tradespeople. Moreover, do not work in the same store more than once in a three-month period. This would typically solve both the security and past participation requirements of the study in a natural way.

Have you ever personally been interviewed in a store? Or have you been "malled," as one client put it? The first event almost never happens, the second is common. Thus in-store interviewing is the essence of statistical security, and it also solves the problem of past participation. If you collect your data in the market, you are statistically unlikely to have problems with either of the twin guards.

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A process and program for improving advertising efficiency and effectiveness

By Harold M. Spielman

Editor's note: Harold Spielman is CEO of MSW Group, the holding company for Great Neck, N.Y.-based McCollum Spielman Worldwide and its subsidiaries and services. He can be reached at 516-482-0310.

Advertising management has the major task of protecting a company's brands, increasing profitable sales, and maximizing the efficiency of the media budget. Certainly, a complex task made even more challenging by the fact that producing effective TV advertising is quite difficult. In the short span of 30 or 15 seconds, the producing agency must:

- attract attention and hold the viewer;
- establish the brand name;
- communicate pertinent informa-

tion and/or create a mood or feeling;

- bring about a change in state of mind or attitude;
- persuade to behave in a prescribed way (e.g., buy the brand).

The difficulty of this task is clearly seen in a very large study that the MSW Group did a few years ago for the Association of National Advertisers (ANA). We reviewed the results of 4,600 commercials that had been taken off-air and tested through our firm's AD*VANTAGE/ACT system. (See sidebar for description of AD*VANTAGE/ACT.) Each commercial was measured on two key criteria. One was awareness, or the ability of the commercial to break out of the cluttered environment of today's TV. Second was persuasion, or the ability to bring about some positive changes in purchase behavior or brand/product atti-

tudes. We compared each individual commercial with the norms within its specific product field. As you can see in Fig. 1, the bulk of the advertising was average, which was not very surprising. On the other hand, only 16 percent performed significantly above the norm in their respective product field. Mediocrity is, in fact, the norm. But perhaps the most disturbing figure was that 34 percent of the commercials that were on-air failed to meet basic competitive goals. Essentially, this represented millions of dollars of media time that were wasted.

Clearly, anything that can be done to reduce the number of ineffective commercials that are put on the air and increase the number of effective ones will vastly improve the efficiency of the ad budget — no matter what size it is.

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But this creative problem can be overcome, as seen in the second part of this study. The distribution on the bottom of Fig. 2 is the percentages of commercials our clients put on-air after they have gone through a pre-test program. The differences are not only statistically significant, they are mind-boggling when translated into the efficiency improvement in the use of your media dollars. Interestingly, about one third of the commercials that come into our shop are simply not going to make it. Again, that's indicative of the great difficulty that exists in producing effective advertising. However, our concern is selecting the ones that are worth producing for upwards of \$600,000 and airing as part of a multi-million dollar media expenditure.

Encourages creativity

From time to time, we hear that pre-testing inhibits creativity. Our view is quite the opposite. It encourages creativity. Why? Because we have never seen creative people who lack ideas. The management problem is to sort those out. Pre-testing allows the client to encourage experimentation and then use the pre-test research to sort out the strong and the weak. Following is a dollar comparative of pre- and post-testing derived from the success/failure rate. From the ANA study, we know that on average one in three commercials will very likely fail. Consequently, to get two successful commercials on-air, you should be producing three and expect to discard one. If you produce the three commercials as "finished"

executions at a very conservative average cost of \$600,000 per "finished" commercial, plus the research cost (three commercials tested at \$17,000 each = \$51,000) that would sort out the relative effectiveness of those three, you would have an expenditure of \$1,851,000.

Figure 1

CHANCES OF SUCCESS WITHOUT PRE-TESTING

Distribution of 4,637 Randomly Selected Non-MSW Client On-Air Commercials On Both Awareness & Persuasion

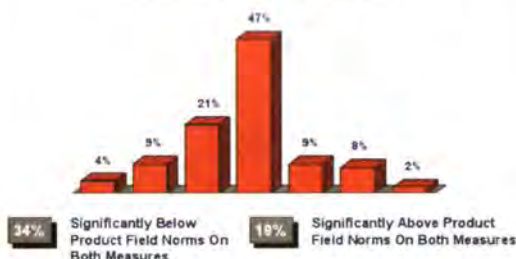


Figure 2

CHANCES OF SUCCESS WITH MSW GROUP'S PRE-TESTING

MSW Client Commercials (3,742) Resulting From Pre-Testing with AD*VANTAGE/ACT On Both Awareness & Persuasion

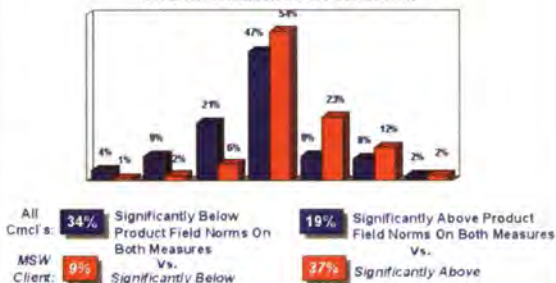


Figure 3

VALIDATION STUDIES

STUDY	NUMBER OF STUDIES	NUMBER OF COMMERCIALS	CLUTTER	REPEATED	PERSUASION	DISMEMBER	MARKET RECEPTION
DK BehaviorScan	3	17	x	x	x	x	x
Mayhew	2	2	x	x	x	x	x
DK/INSW	14	27	x	x	x	x	x
Elm Fast	4	8	x	x	x	x	x
ATS (NSW/SH)	14	107	x	x	x	x	x
Lipton	1	5	x	x	x	x	x
McDonald's	1	253	x	x	x	x	x
Adelman	14	2,145	x	x	x	x	x
Shore/Commercials	2	7	x	x	x	x	x
Philips/Lee Burnett	3	23	x	x	x	x	x
Wigley	3	94	x	x	x	x	x
NPE/ESP	7	7	x	x	x	x	x
DK Adv. Indicator	2	9	x	x	x	x	x
ACT/REGU/TRAC	2	32	x	x	x	x	x
AD*MAP (AA)	1	1,132	x	x	x	x	x
ACT vs. DAK	1	11	x	x	x	x	x
PR Test	1	3	x	x	x	x	x
Deal	1	4	x	x	x	x	x
MSW Technical Papers	1	273	x	x	x	x	x
TOTAL	52	4,936					

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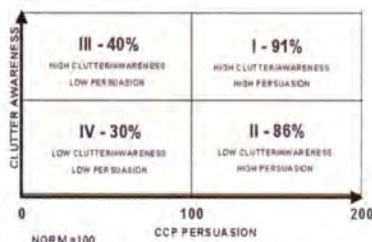
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Figure 4
AD*MAP
MARKETPLACE PREDICTIVENESS

Percent of executions that met or exceeded clients' sales expectations for the campaign

JAR, Oct. 1982
 Base: 1,185 cm's
 Clutter Awareness and Persuasion given equal weight.



However, if you produce the same three in one of the pre-test forms at \$25,000 per commercial, plus the same cost of research, your total expenditure is \$126,000. Now, having selected the two that are most effective from the pre-test research results, you produce only the two strongest in "finished" form, adopting appropriate corrections learned from the pre-testing

While producing TV advertising is close to an art form, copy research can make a real contribution to the creative development process by bringing the consumer into the process. But does this effort reflect itself in marketplace performance? The MSW Group and its clients have, over the years, done substantial work in investigating the

phase.

You now have the total expenditure of \$1,326,000 and you have pocketed a savings of \$525,000. Most important, you know that your advertising dollars will be applied to your strongest messages. This little exercise deals with just one brand. For companies marketing multiple brands, the savings would be appreciable.

predictive relationship of pre-test advertising research measures to in-market performance. Fig. 3 lists a variety of these studies.

One of the most useful and compelling studies was published in the *Journal of Advertising Research* by Klein & Tainter. Based on MSW AD*VANTAGE/ACT studies of over 1,100 commercials, a guide to in-market performance was developed. Essentially, as shown in Fig. 4, we found that those campaigns with commercials in quadrant I (high clutter/awareness breakout and high persuasion, upper right corner) met or exceeded the advertisers' sales goals in 91 percent of the cases. Those that fell in quadrant IV (low clutter/awareness breakout and low persuasion, lower left) only met the goals in 30 percent of the cases. As to the relative influence of clutter/awareness and persuasion, it was clear that for established products, persuasion was the more important factor.

The above study is one of a large number of validation studies carried out based on MSW Group's data. (Details on these studies are available upon request.)

Working with our clients, we have developed a multi-step process we call The CONTINUUM for the development of effective advertising. There are appropriate tools we can bring to bear at each stage in the process; the learning from each stage flows to the next. It is a circle with a feedback system.

Reduce the failure rate

Today we have in hand highly accurate tools for predicting the consumer's response to advertising. A systematic approach to pre-testing will sharply reduce the one-in-three failure rate that we've seen in past studies. Most importantly, pre-testing gives the ad agency the opportunity to experiment and try out the unusual and offbeat, with little risk to the advertiser's brand or budget. In the process, great-looking and sales-effective advertising can come on-air and meld the imaginative needs of the agency and the sales demands of the advertiser. **14**

AD*VANTAGE/ACT combines validated evaluation measures to provide advertisers and agencies with an information package of measures of effectiveness and in-depth diagnostics (standard and custom) to better understand consumer reactions. The use of multiple exposure gives a new commercial a better opportunity to deliver its message. The measurements are:

First exposure - evaluative

- Clutter awareness/brand recall (breakout)

Second exposure - evaluative

- Customer commitment persuasion
 - Brand shift 1st choice
 - Relevant/consideration set
 - Penetration
 - Share of occasions
 - Share of requirements (loyalty)

Third exposure - diagnostic (standard and custom questions)

- Communication
 - Main idea playback
 - Message involvement profile (MIP)
 - Brand
 - Imagery (both brand and corporate)
 - Attributes (both brand and corporate)
 - Comparative brand ratings
 - Execution
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 - Likes/dislikes
 - Reactions to demonstrations
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Consumers' contradictions:

Value

and other brand attributes

By David A. Langley

and Lori B. Cook

Editor's note: Dave Langley is director of strategic research and analysis, and Lori Cook is a senior project manager, at Blue Cross Blue Shield of Maine, Portland. They can be reached at david_langley@bcbsme.com and lori_cook@bcbsme.com, respectively.

This article is the second in a three-part series designed to provide real-world business examples of the effective use and application of research and statistical tools for supporting resourcing and priority-setting decisions. These research application issues have arisen through the authors' work with regional and national studies in health care and other industries. Each of the three

articles in the series provides a summary review and example of how marketing research, when approached as a credible discipline and with a clear view of specific decision support needs, can very effectively inform executive decision making.

The first article in this series, "Effective uses of 'effect size' statistics to demonstrate business value," appeared in the October 1999 issue of Quirk's. The third article, "Impact of health on satisfaction," slated for June 2000 issue, will discuss an example of an effective approach to segmenting the customer base for refining satisfaction-based initiatives and related resource

allocations and decision-making. It will include a review of the technique's business value and use in decision making along with discussion of how operational and survey-based data can be integrated to demonstrate the validity and practical nature of customers' responses on surveys.

When advertising, promoting, and testing brand concepts, how can we ensure that we are consistently delivering a clear and understandable message to our advertising audiences and our survey respondents? In one company's recent experience, apparent contradictions in consumers'

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<i>Best Location</i>	✓	✓
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* Impulse Survey of Focus Facilities 1999.

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Table 1

	Direction of contradictions (Series 1 → Series 2)		
	Positive → Negative/Don't know	Negative → Positive/Don't know	Don't know → Positive or Negative
Attribute A ("value")	52%	22%	26%
Attribute B	34%	36%	30%
Attribute C	25%	47%	28%
Attribute D	25%	50%	25%
Attribute E	27%	57%	16%

perceptions of brand concepts — as observed in responses to survey questions regarding selected brand attributes—raise a number of challenges and questions in this area for both researchers and marketers. For the researcher, issues raised include those of survey methodology (e.g., question wording, order, and scales) as well as the analysis and uses of survey data. For the marketer, the presence and magnitude of these contradictions emphasize the importance of message intent and clarity when advertising and promoting the brand, particularly among key target segments.

The appearance of contradictions

Respondents to a 1999 advertising effectiveness study were asked to rate each of five key brand attributes at two points during the course of a telephone survey interview. In the first series of ratings, near the beginning of the survey interview, the attributes were presented as statements describing the company; respondents were then asked to rate their agreement or disagreement with the statements on a five-point Likert scale:

Example: "On a scale of one to five, where one means you strongly disagree and five means you strongly agree, how strongly do you agree or disagree that [company] offers a best value in [product]?"

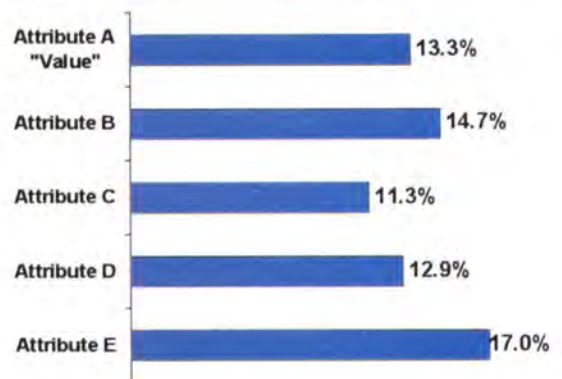
In the second series of ratings, presented toward the end of the survey, the attributes were included among a list of 20 adjectives (the order in which the

adjectives were presented to respondents was randomly rotated). Respondents were asked to dichotomously rate (i.e., yes/no) whether each adjective described the sponsor.

Example: "The following are a list of features which may or may not describe [company]. Please indicate which features you feel describe it. . . Best value in [product]."

When analyzing data from the survey, contradictions were discovered between how respondents rated the brand attributes in the first series of ratings and how they rated the same attributes in the second series of ratings. For example, some respondents who "agreed" (i.e., a top-two box rating) with a statement in the first series of ratings disagreed (i.e., a "no" response) that the adjective described the company in the second series of ratings. Conversely, some respondents who "disagreed" (i.e., a bottom-two box rating) with a state-

Figure 1
Attribute-Specific Contradictions



ment in the first series of ratings agreed (i.e., a "yes" response) that the adjective described the company in the second series of ratings.

In further analysis conducted to determine the extent of these contradictions, it was determined that contradictory

responses occurred among 45 percent of the respondents (i.e., 45 percent of respondents had a least one contradictory response when rating the five attributes).

At the attribute-specific level, the percent of contradictions ranged from 11.3 percent to 17 percent (see Figure 1).

It was also determined that the direction of the contradiction (e.g., positive ratings in the first series shifting to negative or "don't know" ratings in the second series, vs. negative ratings in the first series shifting to positive or "don't know" ratings in the second series) differed depending on which attribute was being rated (see Table 1). Attribute A ("value") ratings were more likely to shift from a positive rating in the first series to a negative or "don't know" rating in the second series. The direction of contradictions was more or less evenly distributed for Attribute B. Among Attributes C, D, and E, ratings were more likely to shift from a negative rating in the first series to a positive or "don't know" rating in the second series. For all attributes, a substantial portion of the contradictions occurred when a

"don't know" rating in the first series shifted to a positive or negative rating in the second series.

"Contradictors" systematically differ from "non-contradictors"

Further analysis was conducted to ascertain whether there were any systematic differences (e.g., attitudinal, demographic) between respondents with contradictory responses and respondents with consistent responses². The presence of systematic differences between these two groups would suggest that the occurrence of contradictions should not simply be attributed to random "noise" or measurement error. A number of significant differences were found.

Attitudinal indicators: lower ratings by "contradictors"

Responses of the two groups were compared on the items that — including the five attributes — comprise the 20-adjective series that was presented to respondents at the end of the survey. On all 20 items, the ratings of the "contradictory group" were significantly lower ($p \leq .05$) than the ratings of the "consis-

tent group."

Responses of the two groups were also compared on four satisfaction measures that came in between the first series of ratings and the second series of ratings. These items measured overall perception of and satisfaction with the company. Again, the ratings of the "contradictory group" were significantly lower ($p \leq .05$) than the ratings of the "consistent group" on all four measures (see Fig. 2).

Demographic differences: unique contribution of gender

The two groups were compared on income, age, education level, region, customer status (i.e., customer vs. non-customer), and gender.

While the two groups did not differ on income, age, education level, and region, non-customers were somewhat more likely than customers to have contradictory responses (32.4 percent of non-customers compared to 26.8 percent of customers).

In addition, women were more likely to have contradictory responses (32.8 percent of women compared to 27.3 per-

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Table 2

	Positive Rating (% "Yes")	
	Consistent Group	Contradictory Group
Attribute A ("value")	93.2%	76.2%
Attribute B	95.2	80.5
Attribute C	88.2	81.5
Attribute D	93.1	80.1
Attribute E	88.4	80.5
Attribute F	87.6	81.9
Attribute G	90.7	82.4
Attribute H	94.2	81.6
Attribute I	90.7	81.4
Attribute J	95.6	83.5
Attribute K	90.9	84.4
Attribute L	95.5	85.5
Attribute M	89.5	84.9
Attribute N	84.5	71.3
Attribute O	92.0	80.0
Attribute P	86.3	80.5
Attribute Q	89.3	80.3
Attribute R	96.8	83.7
Attribute S	92.6	83.4
Attribute T	83.3	72.4
Attribute U	93.5	87.7

cent of men)³. This gender difference cannot be accounted for by other attributes related to "contradictors." That is, while contradictors tend to have less favorable views of the company, be less satisfied with the product, and be non-customers, women do not necessarily share these same features (i.e., they are not more likely than men to be non-customers, nor are they systematically less satisfied). Therefore, it can be assumed that there is a unique relationship between gender and the likelihood of contradictions occurring.

Other gender differences include the following:

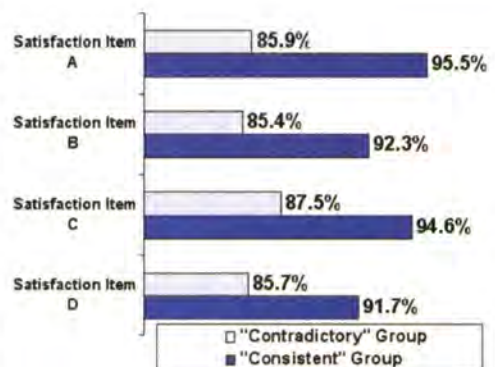
- Women were more likely than men to shift from a "don't know" to having some opinion (for example, for Attribute C, 32.5 percent of women who contradicted themselves shifted from a "don't know" to a "yes" or a "no" response, compared to 18.9 percent of men).

- Women were particularly more likely than men to have contradictory responses for Attribute A ("value"): 15 percent of women compared to 10 per-

cent of men had contradictory "value" responses.

- For the "value" attribute, women were also more likely than men to shift from a negative to a positive response (61 percent of women compared to 49

**Figure 2
Satisfaction Ratings (Top-2 box)**



percent of men), while men were more likely than women to shift from a positive to a negative response (23.5 percent of men compared to 16.7 percent of women).

- On the 20-adjective list, women were consistently more likely than men to give "don't know" responses.



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Unintentional learning

Analysis of the data points to systematic attitudinal and demographic differences between contradictors and non-contradictors. As noted previously, contradictors have less favorable views of the company, lower levels of satisfaction with the product, and are somewhat more likely to be non-customers and women. These findings suggest that these contradictory responses cannot simply be attributed to measurement error.

It is hypothesized that during the course of a survey interview, there was a degree of "unintentional learning" for the respondent/consumer; that is, through presentation of the survey questions that followed the first series of brand attribute ratings (i.e., the four satisfaction measures and the 20-item adjective list) respondents obtained and thought about "new information" to define and interpret the brand and its attributes. This new learning was then reflected in the

(sometimes contradictory) attribute ratings at the end of the survey.

"Value" attribute

Although the Attribute B through E contradictions are interesting and of some concern, primary attention needs to be turned to Attribute A ("value") contradictions. For researchers and marketers, the importance of the finding of contradictions related to this attribute is due to the following:

a) the brand attribute "value" plays a critical role for competitive advantage and brand strength;

b) consumer-based testing used as a basis for the tested advertising design has articulated the importance of this attribute to purchase decisions.

As noted earlier, one-in-six of surveyed consumers held contradictory views of the value attribute (Attribute A). Over half of these value-contradictors moved from a positive to a negative position during the course of the interview. The overall tendency of ratings to move from positive to negative suggests the presence of problematic "unintentional learning" about this attribute during the course of the survey interview.

Key market segments

Another area of interest is the higher likelihood of contradictions in key market segments.

Gender

As noted earlier, findings related to this market segment include the following:

- Contradictions were more likely to occur among women than among men.
- Women were more likely than men to shift from a "don't know" response to having some opinion.
- Women were particularly more likely than men to have contradictory responses for the value attribute.

The importance of these findings relates to the role of women as key decision makers in the market area represented by this advertising study (i.e., health care). The findings suggest the following considerations for this market segment:

- Women may be giving higher levels of consideration to attitudinal ratings.
- Women, as the key decision makers, may be demonstrating a higher level of



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responsiveness to new information and learning in this area, particularly as it relates to value.

Customer status

Contradictions were more likely to occur among non-customers than customers; this suggests a higher degree of unintentional learning among market segments who lack experience with the company.

Conclusions

Interpretations and considerations being used by for advertising and research development include:

- There are identifiable segments in which consumers' understanding and perceptions of the value attribute are not clearly defined but are able to be informed through information and learning.

- Utilizing the ability to move and shape consumer opinion through the presentation of information is a standard opinion survey practice: this can be readily leveraged to manage unformed value perceptions.

- In the survey development phase of advertising research, careful consideration needs to be given to the clarity of question wording and the potential impact of question placement on responses.

- Non-customers: value perceptions among non-customers (who lack experience with a company or brand) are less defined than those of customers; these perceptions and understandings can be readily shaped through information and intentional learning.

- Particular consideration can be given to the design of value messages for women; in health care markets, for example, this segment has a primary role as decision maker; the higher likelihood of women to move from a "don't know" to an opinion position (positive or negative), suggests a higher level of responsiveness to new information than for men, in this case.

Taken together, these considerations point to the need to think carefully about "value" concepts (as well as other core brand attributes) when designing messages, advertising, and survey questions. Identifiable consumer segments are particularly sensitive and responsive to new informa-

tion and opportunities for learning. Since "value" concepts are reinforced by experience with the company and its products, building the value dimension of the brand among non-customers requires added attention by the advertiser. Likewise, emphasizing the informational needs and learning styles of selected segments (e.g., the role of women as primary household decision makers regarding health care) is a key area of focus for effectively tailoring brand messages and their assessments. ¹⁴

For the purposes of this analysis, a "contradiction" was defined as follows: a) a positive rating on the first series (i.e., a top-two box agreement rating) followed by a negative rating (i.e., a "no" response) or a "don't know" response on the second series; b) a negative rating on the first series (i.e., a bottom-two box agreement rating) followed by a positive rating (i.e., a "yes" response) or a "don't know" response on the second series; or c) a "don't know" response on the first series followed by a "yes" or a "no" response on the second series. ¹⁵Since planned minor question wording differences for Attributes D and E offer a possible explanation for the contradictions found in these attributes, the definition of the "contradictory" group was limited to respondents with contradictions in Attributes A, B, or C. ¹⁶
¹⁷p. 1.

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John: I think what the group is saying is correct, we need to modify that ad so there is no longer any confusion on that point.

Monica: Did you see what their reaction was to the new copy?

Debbie: This stuff is addicting, I was just going to log on and watch one group but I think I'll stay for the other one too.

Stan: Hey, this sure beats traveling ! It's about time that somebody figured out how to make this remote viewing possible

John: Debbie, did you see where you can get your virtual M&M's? That was a neat thing that ActiveGroup did for us.


Debbie: Yea, that was cool. I also liked how they tied these groups right into our Intranet too.

Monica: John, since you are at the facility can you get the moderator to probe a bit more on the responses to the new graphics?

John: Sure, I'll send her a note.

Who's Here?

- John
- Monica
- Stan
- Debbie



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Editor's note: Robert Passikoff is president of Brand Keys, Inc., a New York research firm. He can be reached at 212-532-6028. This article is adapted from a speech presented as part of the American Marketing Association's Executive Forum Series "Corporate Branding: Leveraging Your Company's Key Intangible Asset" in New York in February.

Let's review the customer loyalty/profitability mantras of the last century:

- It takes seven to 10 times the cost and effort to gain a new customer than it does to keep one.
- In some sectors, an increase in the customer base by just one percent is otherwise equivalent to a 10 percent cost reduction program.
- Depending upon the category, a 5 percent increase in customer loyalty will lift the lifetime profits per customer by up to 95 percent.

What about this century? What

engine will fuel such loyalty?

Happily, answers for the 20th and 21st centuries coincide: Brand equity.

So the increased importance of strategic brand management and planning in influencing the future of companies should come as no surprise.

The notion of strategic brand management and planning has already altered the view sharply with which some firms are regarding their business. This is especially true in environments where consumers have more options, where information plays a greater role in driving consumer choice, and where levels of accelerated gratification have reached new heights.

These days understanding that doesn't narrow the field very much. Most acknowledge that brand equity plays an essential part in the strategic brand management process, but in our experience, however, few firms can clearly define where their brand equity lies. In fact, even fewer can define their brand equity in the context of the management

challenges they face.

Most of the efforts — and definitions — devoted to brand equity have concerned themselves with image, personality, essence, affinity, naming, identity, and positioning. Most, if one is truthful, have been in aid of communication or design-related development rather than strategic brand management.

And let's be honest. Talking about brand equity in those terms is easy. But if we define the central goal of strategic brand management as the creation of an expanding pool of loyal customers, then, clearly, talk is cheap.

If every definition of brand equity and conception of brand-equity management yielded loyal customers, there would be a lot more loyal customers in the world!

If we revisit the ways most companies identify brand equity, most of the definitions and examples offered up would, once again, reference back to image and positioning, which are the advertising agencies and design firms' best attempts

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at creating manifestations of a brand's equity.

These are creative expressions — entertaining, eye-catching and visually differentiating even, pretty perhaps, but unable to move a brand closer to strategic goals.

This would suggest the need for a realignment of — primarily — the definition of brand equity, and — secondarily — a governing application which goes beyond the communications arena.

A definition is required which is:

- better established within the context of the category;
- better captures the direction and velocity of customer values; and
- far better correlates with the market activities and loyalties of the customer.

That is why we assert that brand equity exists — and only exists — at those points where the brand exceeds customer expectations within the category.

Correctly measured, customer expectations identify how the customer and category values come together to form the dimensions of purchase and loyalty. Correctly measured, customer expectations identify precisely how "high" a ceiling the brand (and marketer) face. And, correctly measured, customer expectations provide a yardstick against which the brand can be measured.

To accomplish this of course, one needs to possess statistically reliable customer assessments of customer expectations.

This would normally bring us to a fundamental discussion of the benefits and deficiencies of various research systems, but that is not our topic.

Not kept pace

Suffice to say, however, that research systems have certainly not kept pace with either the changing dynamics of customer values or the new business and marketing paradigms we face in the new century.

It is sad to note — but cannot be ignored — that the most aggressive minds in an organization rarely focus on measurement systems, and most executives today work with inherited measurement systems which distort their business strategies.

Few, if any, of these systems incor-

porate brand equity as a critical measure, which makes the care and handling of brand equity all the more important.

Let's examine the three key required measures and their import in the identification and planning process:

1) *Category purchase drivers.* We hear talk of changing marketplaces and marketing paradigms, the need to meet and adapt to customers' needs before the competition does, and yet most of the traditional research methods are not leading indicators of customer purchase, let alone accurate portrayals of how the customer views the category, makes brand comparisons in that category, and — ultimately — buys in the category.

2) *Real levels of customer expectations about these drivers.* That is to say, expectations unconstrained by what literally exists today and a reflection of what people really think (as opposed to what they say they think).

3) A precise measure of a product's or service's brand equities.

This is not, of course, meant to suggest that one should ignore traditional, reliable and valid marketing and research techniques. They are generally quite helpful in identifying an opportunity for a company, but they are generally not brand-equity based and will not reveal what the customer is willing to believe about your brand except in the broadest of inquiry circumstances.

Every brand has its own Brand Equity InfrastructureSM, which is based upon the composition and configuration of category purchase drivers, real levels of customer expectations about these drivers, and a brand's true equities.

All of the traditional elements can be in place (acceptable product, adequate distribution, financial wherewithal, attractive logos, attention-getting advertising, etc.) yet we know that some brands can't fulfill the marketing proposition.

Some on-line booksellers (a personal and professional interest of my own), have high-profile sales and share value, but don't generate profits. The convenience of electronic purchase and home delivery is a major factor in stimulating e-commerce, but is convenience the prime factor or a contributing factor?

The answer to this question could well determine the success of e-commerce brands.

The category leader is revolutionary newcomer Amazon.com. Neither a book shop nor a retail chain, Amazon exists only in cyberspace, but boldly advertises itself as "Earth's Largest Bookstore."

By combining shop-at-home convenience and speed-of-light transactions with an understanding of the evolving e-market, Amazon has built a loyal franchise and created a formidable brand in less than five years. In fact, the most astonishing thing about Amazon is how quickly they became a trusted brand.

Given the dominance of Amazon.com, chased on the net by Borders and Barnes and Noble, and a howling pack of wannabes, the question emerges: Is there enough space for other on-line branded booksellers to prosper?

That depends upon the bookseller's brand equity. In order to compete — let alone thrive — in the increasingly bustling e-marketplace a company must know both the market, and consumers' changing values in order to build a brand.

Amazon understood that the Internet is more than a high-speed cash register. It's a whole new way of connecting with customers. The Internet isn't a distribution channel, it's a community, and every community has certain key values that govern its behavior. What's this new community like? What do they want? What are their brand values, and which of those values do we share? Which services — based upon these values — can we provide, beyond a fast, cheap way to buy stuff?

Amazon made its mark with huge selection, easy purchase, good prices, and credit card security, all in a way which resonated with customers' brand values. It is current and colloquial and speaks the dialect of their market. It learned which brand values drive its purchasing and based its service on those values. Amazon was obviously fully awake during the early morning hours of e-commerce.

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into the brand arena of the 21st Century, you must ask the above questions, and others.

You'll get different answers from Amazon, because you're asking your questions later in history among a different brand set and, more importantly, among a more attuned customer base.

Can you do it the same way Amazon did it? Yes, but the world has changed a lot since 1995. E-commerce has exploded. New strategies, based upon new consumer-to-brand modeling are

needed to measure the values that motivate the rapidly-changing e-marketplace.

The speed and convergence of social and technological change make it difficult to execute anyone else's five-year-old game plan with any hope of repeating their success. Relying upon traditional brand research techniques, some of which are over 40 years old, make it impossible.

How, then, to build a strong brand ("e-" or otherwise)?

Central to the process — as previously mentioned — is knowing how purchase drivers combine to create a perception of your brand. Our studies indicate that the four basic drivers for on-line book customers are: right product (has what I want), ease of operation (hassle-free Web site), good price-value relationship, and system/payment security (no anxieties).

Virtual book shops lack the brand value dimensions usually associated with book buying. Book people enjoy the physical process of book shopping — the touch and smell of books, the chat with other book-lovers, cappuccino and the quiet swirl of classical music. Convenience isn't the point. Buying on-line may be faster, but it's an entirely different experience based on entirely different brand values. Which may be why the bn.com "brand" isn't as highly rated as Amazon.com, but Barnes and Noble, the store brand, does quite well.

On-line merchants must address these issues in a way that satisfies the value system of the customer. People aren't as easy to study as they were in slower times. How they make decisions has become more complex, as they're in constant motion — often very fast motion — especially those who are plugged into the Net.

And despite increased advertising budgets, it's getting harder and harder to build a successful brand. Customers have more choices and can exercise those choices more easily. And the more numerous the purchase options, the greater the need for concentrated, differentiating brand management.

The exercise is even more complex given the recognition that to build a brand is to develop loyalty among increasingly fickle folks. It's not just share of market, but also share of customer that matters.

Internet brands owe at least some of their early success largely to novelty. But now, at the high noon of both traditional and e-commerce, the dew is off the rose. As competition thickens, only the companies that fully understand the changing values of the marketplace are likely to prosper as viable brands. They must continually probe the dimensions of customer and brand values, or their



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prospects would appear to be very questionable indeed.

Highly evolved customer-listening systems provide the wherewithal to effectively track the velocity and direction of customer value — the key element in being able to actually measure a brand's equity.

By doing so, it will allow a brand to determine its trajectory as it enters into the "world of tomorrow," which was — as it turns out — yesterday.

Still a gap

To review, the three key required measures for successful management in the e-commerce age are: leading-indicator category purchase drivers; real levels of customer expectations about these drivers (expectations unconstrained by what exists today and a reflection of what people really think as opposed to what they say they think); a precise measure of a product's or service's brand equities.

What is evident is that there is an intellectual gap between what we know and what is still practiced.

What is manifest is that the techniques developed and handed down over the past half-century are no longer equal to the task at hand, and if the changing dynamics of customer values demand new marketing paradigms, they also

require 21st Century assessment tools.

As we move into the new millennium, it is incumbent upon brand planners to capitalize upon the power of their brand's equity in its definition and in its application. **TQ**

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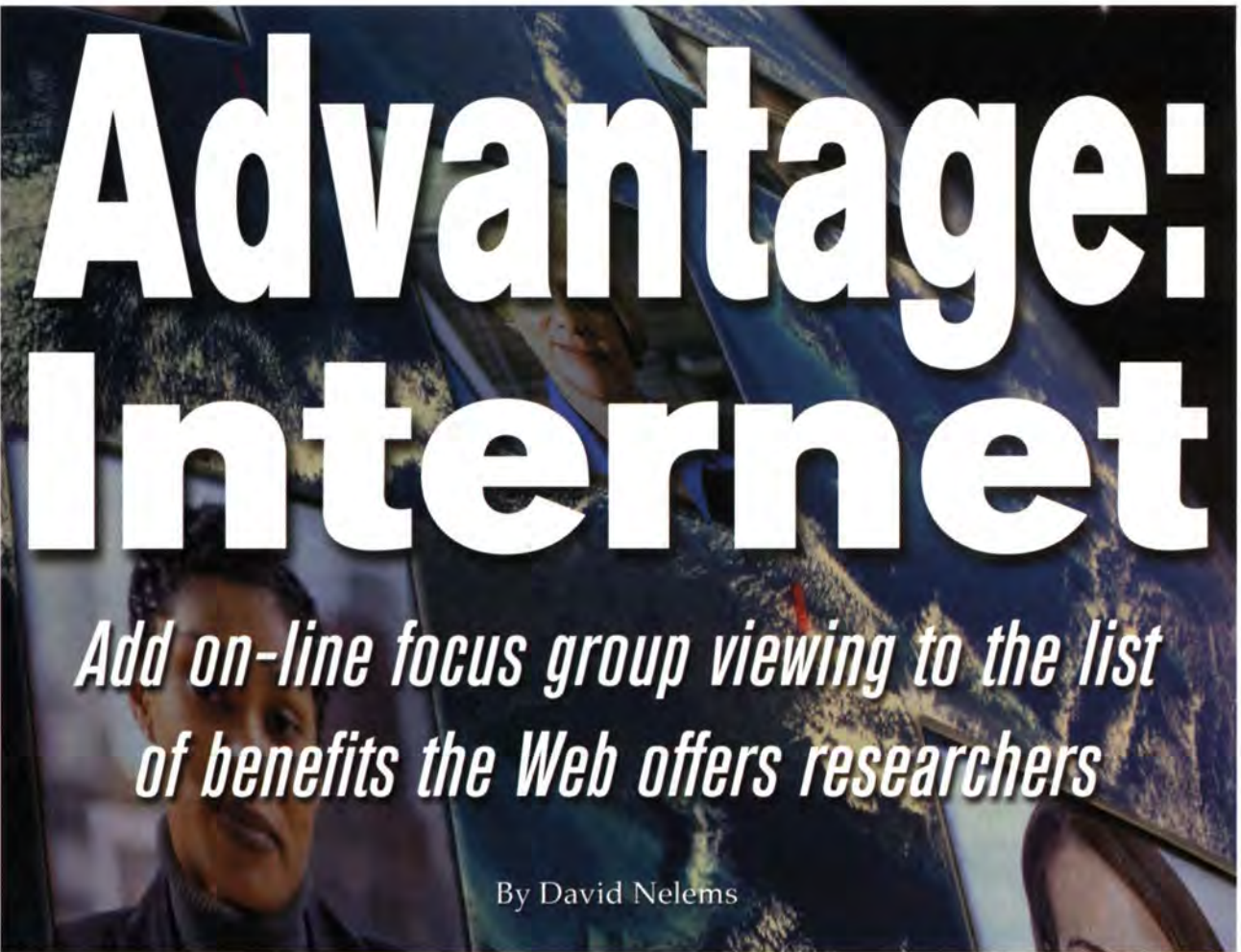
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Advantage: Internet

Add on-line focus group viewing to the list of benefits the Web offers researchers

By David Nelems

Editor's note: David Nelems is president of ActiveGroup, a Norcross, Ga., research firm. He can be reached at 770-449-5539 or at david.nelems@activegroup.net.

Flexibility and convenience. Two simple words that sum up why the Internet is revolutionizing every aspect of business. The flexibility of the Internet allows you to get the information that you want, tailored specifically for your needs and the convenience allows you to receive that information wherever and whenever you want it.

Flexibility and convenience are also two of the reasons that the marketing research industry is now rushing to embrace the Internet. Although the research industry has sometimes been slow to adopt new technology, the industry embrace of the Internet is

encouraging.

A third advantage of the Internet is streaming media. If you haven't heard of it yet you soon will, as this technology begins to play a more important role not only to the Web in general but to the research industry in particular.

What is it?

With this technology you can listen to and watch events live or later when your schedule permits it. In the past, to view this type of rich content you had to download the file. And since a one-minute video may have taken 30 minutes to download, few people did it. Enter streaming media. Much like TV or listening to the radio, you receive the images or audio just before you see or hear them.

Paced out over time, the file size of the clip becomes less of an issue — though it is still an issue. Raw digital

audio and video files are absolutely huge. So to get them down to a size that works for a modem or LAN, compression is used. The goal of streaming compression is to throw away data that you don't need. That makes the file size much smaller. But it also begins to degrade the image and sound.

Media producers, especially those with television backgrounds, often criticize the quality of streaming media. They miss the whole point. Streaming media isn't about quality. It's about access. It's about being able to sit in an office in New York and receive content on-demand from Los Angeles.

Fortunately, most Internet users do get the point. Throughout the history of all forms of media, the new medium has often paled in comparison to the old one. But the new medium offers capabilities that the old one does not. With streaming media, it's all about

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access. The pictures may be fuzzy and the sound occasionally garbled. But when a Web user clicks on that link and gets media on-demand, that is power.

Streaming media and research

So, now the Internet and the research industry have this great technology out there. The big question is: How does this benefit you? In a number of ways. One already-available way is using this technology to broadcast focus groups and IDIs over the Web so that clients no longer have to physically go to the

group. My firm began offering this service and technology in late 1998 and has partnerships with facilities across the country. (*Editor's note: Stamford, Conn.-based FocusVision Worldwide also offers on-line focus group broadcasting through its FocusVision Online service.*) Now, when a client wants to watch their qualitative event on the Web they simply tell the facility to add on that service just like they would if they wanted videotaping. It becomes simply another service that the facility offers their client.

With this approach we come back to the flexibility and convenience issues. Clients now have the flexibility to watch their event either live, or on-demand whenever they have the time to do so. They also have the flexibility to have the groups indexed so that in addition to having fast-forward and rewind controls they can actually jump directly to a specific portion of each group. This flexibility also is appreciated by viewers in other time zones or other countries that can watch the group when they are ready for it rather than having to get up at 5 a.m. to watch a live videoconferencing event (not to mention having to then drive to that videoconferencing facility as well).

And the Internet broadcasting of groups allows for more people to be involved in the event. Traditionally, the people who attend focus groups are in the middle management sections of a company. This is because the executive level does not have the time to travel to the groups and the junior people do not have the seniority to attend them — or the budget. By broadcasting the groups on the Web, the junior people have access to them right on their own computer; and that computer can be at the office or at home. The same goes for the senior level folks. In fact, the on-demand video can even be chopped up and sent as e-mail attachments. In other words you can send the boss an e-mail with the two-minute segment of the interview that reinforces the items you have been telling them about — and when it comes from their customer's mouth and they can see and hear their customer talking about

them, it has a big impact.

Collaboration and more

With Internet broadcasting of groups you also have the ability to keep all of the brainstorming that goes on behind the mirror, even though all of the viewers may be all over the world. Client Lounge, our company's on-line viewing interface, embeds the video in a chat room so that all of the people who are logged on can interact with each other and discuss ideas as the group is occurring. What's more, you do not have to take any notes, as a transcript of the session is saved and available later. And just as a traditional Web page has hyperlinks to other relevant information, our service lets our clients see the profile sheets, the moderator discussion guide, links to other Web sites and even their virtual M&M's.

Another benefit of watching groups over the Internet is that the content is now digitized and can be included in presentations such as PowerPoint. Clients get a CD at the facility immediately after the groups containing all of the content. No more videotapes and audiotapes if you don't want them. Clients also get a CD at the end of the job that contains all of the content across all markets.

Other research applications

So what if you do not want to do qualitative research? Another application for streaming media would be its use for advertising effectiveness testing. With the Internet as your means of distribution you can allow respondents to view ads on their own computer and then take a short survey. This incorporates the growing popularity of Web surveys with rich media. Regardless of if you solicit the respondent via generic e-mail, specific e-mail, telephone or snail mail, once they get to the page they click a button to see the ad. You can also include a number of ads to play one after another just like a television experience and you can also have the Web server automatically rotate the ad streams if that is necessary. By using the Web for this type of research, you reach a lot more people a lot faster.



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Security and quality

Other important issues are quality and security. Although the current quality of streaming media is not that of broadcast-quality television, it will be in the next two years. The combination of increasing broadband connections to the Web and the continuous improvements of the streaming media software will mean that there will be little difference in the quality. But until that time, remember one of the big words in the Internet: AOL. With over 20 million subscribers AOL cannot be ignored and the fact that their service really only supports modem speeds up to 52K is a big factor.

When looking for a streaming media partner make sure that they can provide your content to the dial-up modem users. Content that looks great but that can only be delivered over a T1 line does 98 percent of the home users no good whatsoever. In fact 70 percent of our clients view their groups over dial-up modems. If they have to stay in the office late at night to view the content, you throw the flexibility issue out the window. In addition, companies that have broadband access to the Web often restrict the amount of bandwidth that each user can receive in order to let other users log on and complete other tasks.

Security is a major concern and rightly so. You want to make sure that your provider guarantees the security of the content, not only with standard non-disclosure agreements but also by making sure that your data does not go over a third-party network. It will not make your client happy if she finds out that her groups are streaming through a third-party server that also hosts 100 other Web sites.

Technical skills

The other important item to consider is whether the company you are sending your content through really understands the technology they are providing to you and also understands your core business. Just because a

company can stream your content doesn't mean that they can make other changes to your supporting Web pages, such as the survey or other content. The Internet speeds everything up and many clients will want to make changes to the supporting pages on the fly, so make sure your service provider has real-time access to the pages for your changes.

Tired of the hype

You have probably heard so much about the Internet that you are tired

of the hype. But the Internet is going to have such a profound difference in the future that it is, in fact, probably underhyped. It is important that the market research community keeps abreast of new technologies and how they can best be used.

Granted, not all clients and projects will require streaming media, but as the Internet continues to change the ways in which you can gather, distribute and report on your data, these new technologies will be hard to ignore. **TM**



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Data Use

continued from p. 16

ual's betas, his/her probabilities of achieving some outcome (choosing products, or rating brands in a certain way) is governed by a particular model, such as multinomial logit or linear regression.

Initial crude estimates of betas are estimated for each respondent to use as a starting point. New estimates are updated using an iterative process called Gibbs Sampling. The model estimates individual betas as well as the mean and covariances of the distribution of betas. In each iteration, an estimate is made for each parameter, conditional on current estimates of the others. This is done by making a random draw from each conditional distribution. Eventually, after many iterations, this process converges to correct estimates for each parameter. In other words, the HB algorithm produces betas that fit each individual's outcome reasonably well, but "borrows" information from other respondents to stabilize the estimates.

After a certain number of "burn-in" iterations (often 10,000 or more), convergence is assumed and the estimates of respondent betas are saved after each or (preferably) every *n*th subsequent iteration. These saved results are called "draws" and they reflect the uncertainty around each respondent's estimated betas. Often hundreds or even thousands of draws are saved per respondent. Point

estimates of betas are computed for each respondent by averaging the respondent's draws.

Why all of the attention for HB?

• In application after application where respondents provide multiple-observation data, HB estimation seems at least to match and usually to beat traditional models. Conjoint analysis is a prime example of an application that benefits from HB estimation.

• HB estimation is robust.

• HB permits estimation of individual-level models, which lets marketers more accurately target/model individuals. More specifically, HB permits estimation of models too demanding for traditional methods; even when estimating more beta coefficients per individual than there are individual observations.

• Aggregate estimation models confound heterogeneity and noise. By modeling individuals rather than the "average," HB can separate signal (heterogeneity) from noise. This leads to more stable, accurate models whether viewed in terms of individual- or aggregate-level performance.

• The "draws" (replicates) for each respondent provide a rich source of information for more accurately conducting statistical tests and, for example, estimating nonlinear functions of parameters such as shares of preference.

We do not suggest that HB is a panacea. However, we have been impressed by the way HB handles numerous real-world and synthetic data sets that we have tested. It generally beats other analytical techniques with which we are familiar. We expect HB soon to become a mainstream analytical technique for market research.

The remainder of this article will deal with three common research situations that can benefit from HB estimation: regression analysis, choice-based conjoint (discrete choice) and adaptive conjoint analysis (ACA).

Hierarchical Bayes regression

Regression analysis is widely used in marketing research for quantifying the relationship between predictor variables and an outcome. The predictor variables are termed independent variables and the outcome the dependent variable. As an example, in customer satisfaction modeling, the independent variables can be respondents' evaluations of brands on different aspects such as quality, performance, and service after the sale. The dependent variable is usually a measure of overall satisfaction with the brand or likelihood of purchasing that brand again.

Multiple regression models take the general form:

$$Y = b_0 + b_1X_1 + b_2X_2 + \dots + b_nX_n$$

where,

Y = dependent variable

b_0 = constant

$b_1 \dots b_n$ = regression weights (betas)

$X_1 \dots X_n$ = independent variables

The goal of the model is to minimize the difference between the predicted and actual values of the dependent variable. The degree of fit is termed R^2 . An R^2 of zero

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implies that the predictor variables provide no information to predict the dependent variable, and a value of 1.0 implies perfect fit.

Often in marketing research we tend to apply regression analysis to a group of observations that individually have different relationships between the independent and dependent variables. Consider people's opinions toward anchovies on pizza. Anchovies are generally either liked or despised. It is rare to find an individual who is lukewarm about anchovies. The distribution of individuals with respect to anchovy preference is not a normal bell-shaped curve, but perhaps has two humps, reflecting the mixture of two very different populations.

Consider a hypothetical satisfaction study for pizza in which respondents tasted four different pizzas (some with anchovies and some without) and then rated each pizza on an overall desirability scale. To analyze the data, we apply a regression model to predict respondents' satisfaction for pizza based on whether it had anchovies or not. Let's assume that the independent variable (X_1) indicating whether a pizza had anchovies or not was dummy-coded (0=no anchovies; 1=has anchovies). Further assume that half of the population loves anchovies and their true beta weight b_1 (the increase in satisfaction due to the presence of anchovies) is +10 (plus or minus some error). The other half of the population despises anchovies, $b_1 = -10$, again plus or minus some error.

When we pool the data and estimate b_1 , we discover that b_1 is close to but not significantly different from 0, and the R^2 is also near zero. (Both values would be exactly zero if respondents answered without noise and all used the rating scale in the same way.) Without any additional information, we'd be tempted to report that anchovies do not affect people's satisfaction with pizza whatsoever. And we would be dead wrong. The aggregate regression model has ignored heterogeneity and simply tried to describe the "average" respondent. Moreover, because aggregate regression cannot distinguish between (confounds) heterogeneity and noise, the estimate of b_1 is not as precise as it could be.

Hierarchical Bayes can deal much better with this situation. HB "borrows" information from other respondents to compute relatively stable individual-level results when respondents provide multiple observations (in our example, respondents evaluated multiple pizzas). One can even estimate useful individual-level models for more independent variables than a respondent has given observations — an impossible feat for traditional regression.

By estimating betas separately for each individual rather than just for the average of all people, HB separates heterogeneity (signal) from noise. The use of HB for this problem would reveal that anchovies significantly affect people's satisfaction for pizza. For HB, the average R^2 (the result of R^2 measured at the individual level and then averaged across respondents) is significantly greater than 0. If we submitted the individual-level betas to a cluster analysis, we'd learn that there were two distinct types of people with opposite opinions. We'd note that mean value for b_1 was near zero.

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But, because HB has been able to separate the heterogeneity from the noise, the average estimate of b_1 is more precise, and closer to zero than with aggregate regression.

Those readers attuned to the assumptions of HB will point out that this hypothetical situation is at odds with HB's assumption that respondent betas conform to a normal distribution. The beta weights are indeed tempered by this assumption, but the observations provided by each individual still strongly influence the individual-level betas. We've analyzed a synthetic data set conforming to the pizza example with HB and observed that it deals well with this problem. Respondents are separated into their respective populations, the individual estimates of beta closely fit the true betas, and estimates of aggregate betas are measured more precisely than under aggregate regression.

It is worth noting that latent class methods are also useful in dealing with heterogeneous populations. For this simple pizza example, a two-group latent class solution would be entirely appropriate. However, latent class solutions are subject to local minima, they typically do not achieve proper individual-level estimates and, like cluster analysis, the analyst must decide how many groups (classes) are appropriate.

While the pizza example above is a very simple illustration, the principles are important and relevant to more complicated regression problems in marketing research: for example, ratings-based conjoint analysis or price-elasticity measurement from scanner data, where the unit of analy-

sis is stores rather than individuals. The major take-aways are as follows:

- If respondents (or another unit of analysis such as stores) provide multiple observations, HB can be used to estimate individual-level betas.

- HB can distinguish between the heterogeneity and noise that aggregate regression modeling confounds. This results in more precise estimates of average betas than under aggregate regression.

- The individual-level beta weights can be used to segment respondents, using methods such as cluster analysis, neural networks, CHAID or AID, or banner points (filters) such as in crosstabs.

Another problematic issue that often derails multiple regression models is lack of independence (colinearity) among the independent variables. Consider a customer satisfaction study in which respondents evaluate multiple brands on various product-related features (independent variables) and then provide an overall evaluation of the brand (dependent variable). The goal of such a study might be to derive the weight (importance) each feature has in driving overall satisfaction. If some of the attributes have overlap in meaning for many of the respondents, such as "reliability" and "durability," regression modeling will have a difficult time distinguishing the relative weight of these two related items. As a result, colinearity leads to unstable estimates of beta weights. HB significantly reduces this problem by distinguishing heterogeneity from noise and by

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leveraging information from respondents whose ratings reflect better discrimination between "reliability" and "durability" to improve the measurement for respondents who did not make such distinctions. The result is more precise estimates of both individual and aggregate beta weights.

Marketers should be more concerned with profiling and targeting individuals and segments rather than the market average. HB methods support this strategy and are very valuable for problems that have traditionally been analyzed using aggregate regression. Whether the researcher's interest lies in achieving aggregate- or individual-level estimates of beta, for studies in which respondents provide multiple observations, HB usually beats aggregate regression.

HB for choice data

Choice-based conjoint (discrete choice) measurement has grown in popularity over the last five years. Many researchers assert that choice-based tasks are more realistic for respondents than ratings- or rankings-based conjoint questions. However, choice-based conjoint data don't contain as much information per unit of respondent effort as traditional conjoint analysis. Respondents evaluate multiple products in choice sets, but they typically only indicate which one within the set they would choose. We don't learn how much more desirable the chosen product is over those not chosen, nor do we ascertain the relative values of the non-chosen product concepts. As a result, stable individual-level estimation was previously not feasible. Researchers, rather, pooled respondent data using methods such as logit to model the "average" respondent.

Using the logit rule on aggregate data led to IIA (red-bus/blue-bus) problems in simulations. A new alternative in a choice simulation took share from existing products in proportion to their shares. Cross-elasticities and substitution rates among competing products were assumed to be equal, which certainly wasn't realistic. To alleviate these problems, some analysts turned to building more complex models with additional terms to account for respondent characteristics, cross-effects, availability effects and interactions. These models were complicated to build, and the specification could balloon into a very large number of terms. Estimating so many

terms ran the risk of overfitting. Still, for the expert logit modeler, the results could be quite satisfactory and could largely overcome the IIA problems resulting from aggregation.

Other techniques such as latent class analysis were developed to deal with the problems of aggregation and IIA. The latent class approach segmented the market into relatively homogenous groups and fit an average model within each group. Latent class analysis is an important development and is very useful for market segmentation. Even though latent class helps reduce IIA problems, it fails to provide accurate individual-level estimates.

Then came Hierarchical Bayes. The HB algorithm can also be adapted for choice data, where the model is a logit specification and the fit is measured in terms of log-likelihood. Its ability to borrow information from other respondents to stabilize part worth estimation for each individual is particularly valuable for choice data. Rather than rely on the logit rule for market simulations, the researcher can apply a first choice (maximum utility) rule to the individual-level estimates (or the multiple draws). The first choice rule is immune to IIA difficulties.

Applying HB to choice data lets analysts largely solve IIA problems and capture complex cross-effects (through market simulations) using very simple model specifications (such as main effects only).

HB for ACA part worth estimation

According to a 1997 industry survey conducted by Wittink, Vriens and Huber, ACA is the most widely used methodology in the world for conjoint analysis. Given its popularity, it is not surprising that ACA has been widely scrutinized and been the subject of a great deal of debate. Most notably, in a 1991 *Journal of Marketing Research* article by Green, Krieger and Agarwal, ACA was criticized because of potential scale incompatibilities between the self-explicated priors and conjoint pairs sections of the interview.

ACA version 4 was released shortly after the 1991 *JMR* article. It used a slightly different technique from earlier ACA versions for combining self-explicated priors and conjoint pairs information. Even after the upgrade, ACA remained an approach that, while having a loyal following

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and working well in practice, was still based on computational procedures that to some academics and statisticians were not theoretically pure.

In 1995, Allenby, Arora and Ginter published an article also in the *JMR* reporting improvements for ACA through Hierarchical Bayes estimation. Allenby and a number of co-authors' collective work on HB methods has been groundbreaking and important.

HB provides two major benefits for ACA part worth estimation:

1) HB improves the quality of each individual's utility estimates by "borrowing" information from other individuals. This translates to more accurate predictions of both individual choices and share estimations. We have tested the results on dozens of real and synthetic data sets. HB at least matches and usually beats traditional ACA utility estimation.

2) HB provides a more theoretically sound way of combining data from the self-explicated and paired comparison sections of the interview. Because the self-explicated priors information can be applied in a purely ordinal way as constraints, it entirely avoids the issue of combining two separate sets of metric dependent variables with potentially different variances.

Not only is the technique more defensible, but the results are generally better. Notably:

- HB utilities are less biased toward equal utility increments spacing between levels as compared to ACA v4.
- HB importances reflect slightly more discrimination than

under ACA v4.

- HB does a better job of estimating utilities for the levels not taken forward into pairs when using "most likelies" and "unacceptables."

In addition to those benefits, ACA surveys can now be shorter. HB estimation does not require the calibration concept data (unless one wants to calibrate the data for purchase likelihood simulations). Therefore, this sometimes confusing section can be cut from ACA surveys. Rather than reducing the length of the interview, the researcher might decide instead to add a few more pairs questions to further stabilize utilities.

Coming of age

Hierarchical Bayes estimation is coming of age for market researchers. Academics have published the algorithms and off-the-shelf software is available. PCs are now fast enough to handle small to medium-sized market research problems in a reasonable time (usually between 30 minutes to four hours). But large marketing research problems may still require many hours of processing time.

By using HB estimation, researchers can improve the reliability and predictive validity of their models. HB estimation helps with some common, vexing challenges, including trying to estimate stable individual-level models from sparse data, multicollinearity and the IIA (red-bus/blue-bus) problem in logit simulations. Moreover, the draws generated by HB are useful for statistical testing and estimating non-linear functions of the parameters. *TD*

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Survey Monitor

continued from p. 8

to shop for furniture more often, but respondents say they just don't have the time or find it too difficult to find quality furniture at the right price.

Most people would rather buy new furniture or redecorate their homes more often — every three years — but the greatest barrier is finding the time, say a majority (56 percent) of consumers. On the average, it takes people about seven weeks to shop for a major furniture item such as a couch or table, with consumers in their 30s averaging nearly eight weeks; those in their 40s average even longer — nearly 10 weeks.

Furniture shopping consists of both an emotional purchase (based on aesthetics) as well as a rational decision (based on utility considerations and the financial investment). However, consumers report that it's often fraught with hassles. Of those surveyed, 47 percent of consumers reported difficulty finding furniture at the right

price; 35 percent had trouble finding the quality furniture that they wanted; 28 percent had difficulty identifying stores with their favorite styles; 24 percent had problems getting the information they needed to make their choices; and 24 percent wanted more help and suggestions for redecorating.

Shopping for furniture on the Internet presents a solution to current furniture shopping hassles for many consumers. One quarter of consumers say they will shop on-line for furniture (23 percent) and other home furnishings (25 percent). That's a 35 percent increase in the number of consumers interested in moving on-line to shop for furniture over the first half of 1999.

The study was conducted on behalf of Furniture.com by Socratic Technologies Inc., Newton, Mass. The survey was conducted via the Internet with completed interviews from 1,000 people representing a cross-section of the adult U.S. on-line population who shop for furniture. Respondents were screened to ensure they were at least 18

years of age, have shopped for furniture for their homes during the past five years, or plan to purchase furniture for their homes over the next 12 months. The sample for this study was drawn from the Socratic Forum, a community of over 12,000 Internet users who participate in Web surveys from time to time.

Survey reveals what hotel guests steal, leave behind

We're all guilty of it. We check into a hotel, and upon departure grab those little soaps, shampoos, maybe a hanger or two. "At these prices, I deserve it," we tell ourselves. But what else do some of us think we deserve? And what do we junk to make room in our suitcases for these newly stolen treasures? *WHERE* magazine, the visitor publication found in the rooms and concierge desks of the better hotels around the globe, conducted a survey in 11 of its cities in the U.S. and Europe to find out, calling hotel housekeeping departments and asking what typically was taken from and left in rooms. Hotels were also asked for a list of the most unusual items taken and left behind.

The top five items taken from hotel rooms were: 1) towels; 2) soap; 3) shampoo; 4) bathrobes; 5) hangers and ashtrays.

There were some regional differences: Towels are the theft of choice in Los Angeles, where it was cited by 80 percent of respondents, while in New York it's bathrobes that should be chained down. Fifty percent of those surveyed in Paris mentioned ashtrays, and 30 percent of the housekeepers in Las Vegas said that bed linens were the item most often taken by guests.

According to the housekeeping survey, the top five "unusual items" were: 1) TVs; 2) irons and ironing boards; 3) pillows; 4) radios and/or stereos; 5) pictures and wall hangings.

A porter at the Hotel Intercontinental in Paris actually carried a television set in a duffel bag out to a hotel guest's car.

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Someone stole a reclining chair from the Drury Inn Westport in St. Louis, while in New York, one guest walked out with a sink at the Crown Plaza and the safe deposit box from the closet of the Essex House. And what would a visit to London's Marriott County Hall be without lifting a kettle and teapot? But the award for bulkiest theft must go to the Las Vegas guest who left the Sahara Hotel unchallenged with a 6-1/2-foot-high tree.

What do guests leave in exchange for these stolen items? The top five list is made up of: 1) clothes; 2) shoes; 3) underwear; 4) cell phones; and 5) toiletries.

According to Steven Flans, *WHERE's* research director, the items on the unusual left list had some interesting consistencies and geographic skews. Sexual paraphernalia ranked first overall. "This category," says Flans, "was most popular in the Midwest, with 70 percent of St. Louis hotels reporting this in their lost-and-found, followed by 50 percent of Chicago respondents. However, as you move toward both coasts, these items drop down the list. Interestingly, in Las Vegas, sex toys are tied with dentures as most unusual." The results from London showed that they have much in common with their Midwestern brethren: Seventy percent of those surveyed also discovered sexual devices in rooms. In fact one guest at the One Aldwych Hotel was bold enough to leave a whip behind — and later ask that it be returned to him.

Los Angeles heads the list as the city with the most unusual items guests left behind, including an iguana (Disneyland Hotel), bags of marijuana (Hyatt Regency), and empty vials of Viagra (New Otani).

What was the story behind the wedding gown left at the Adolphus in Dallas, or the weapons left at the Scottsdale Camelback Resort and the Meridien Montparnasse in Paris? Or the blow-up doll left at London's Sheraton Park Tower? And the six-foot stuffed Odie in the Bellagio in Las Vegas or the live goldfish at Harrah's? And better not to ask why human eyes were left behind at the Essex House in

New York. Some things just shouldn't be explained.

Americans swoon over romance fiction

At a time when tales of illicit sex are standard fare in the daily media, many Americans are escaping the scandal by reading about passion with a happy ending — a romance novel. A Maritz Poll conducted by Maritz Marketing Research in St. Louis in conjunction with the Houston-based Romance Writers of America studied the popularity of romance novels and found that 33 percent of Americans currently read romance fiction. Although 45 percent of readers are women, 16 percent of men also indulge.

Overall, readership is higher in the West (36 percent) and lower in the Northeast (26 percent). Fans peak at the high school graduate education level (42 percent). For college graduates and for those with less than a high school education, readership decreases to roughly 25 percent. Neither age nor income appear to be factors in the popularity of romance books.

Romance fans cite the following top five qualities that most appeal to them about romance fiction: fun/enjoyable, 19 percent; happy endings, 18 percent; escapist/entertaining literature, 17 percent; romance, 14 percent; fast read, 10 percent.

Those who abstain from reading romances cite the following reasons: prefer other forms of fiction, 36 percent; the books are a waste of time, 29 percent; prefer non-fiction, 10 percent; the books are poorly written, 5 percent; the books are aimed at women, 4 percent.

The study also revealed some general literary habits of Americans: 62 percent of people read at least one book a month, with the average reader finishing 3.4 books per month. People who said "none" to the number of books read per month were then asked about their annual reading habits: 14 percent read one to three books per year; 3 percent read four to six books each year; and 20 percent don't crack

a single book all year. Women are bigger readers than men, averaging 3.6 books monthly vs. 3.1 for men (of those who read at least one book each month).

More than half of Americans (54 percent) usually obtain their books from a book store, followed by the library (33 percent), borrowed from friends and family (22 percent), department and discount stores (9 percent), and book clubs (6 percent). Men are significantly more likely to shop at book stores (60 percent vs. 49 percent of women); women tend to borrow from friends and family (25 percent compared to 17 percent of men). About 3 percent of men order books from the Internet compared to 1 percent of women.

Book sellers, publishers, and marketers always want to know what gets a reader to buy a book. Maritz Poll participants cite the following top five reasons that appeal to them most when buying a book: author, 29 percent; topic/subject, 25 percent; back cover plot summary, 19 percent; word of mouth (media, friends), 13 percent; packaging/front cover, 5 percent.

Men are significantly more concerned with the topic or subject of the book (31 percent vs. 20 percent of women), while women rely more on the back cover plot summary to make the sale (22 percent vs. 15 percent of men). For more information call 800-446-1690 or visit www.maritzpoll.com.

Internet cheaper than TV, print at driving drug requests

To influence the market of 34 million adults who request specific prescription medications from their doctors, pharmaceutical companies spent an estimated \$915 million on direct-to-consumer (DTC) advertising in the first half of 1999. In contrast to the \$530 million spent on television ads and the \$370 million spent in print, Internet advertising spending totaled an estimated \$10 million — accounting for just over one percent of total

DTC outlays.

A new analysis from New York-based Cyber Dialogue of the return on investment (ROI) from sector expenditures reveals a dramatic difference in on-line versus off-line effectiveness. According to Cyber Dialogue's model, the amounts spent to drive a single specific drug request by a consumer differs greatly across the three media studied. The model found that the cost to pharmaceutical companies amount to: \$220 per specific drug request for print ads; \$197 per specific drug request for television ads; \$14 per specific drug request for the Internet.

These findings confirm that there is a significant opportunity for pharmaceutical companies to target health care consumers on-line and build long-term relationships that are not possible through traditional media such as print or television advertising. Although the per-prescription costs cited above do not reflect the total cost of generating a prescription request (which includes medical journal advertising, sales force

detailing, public relations, etc.), they are an important indicator of the power of the Internet to target and reach the growing number of health consumers on-line.

Of those consumers requesting a specific drug from their physician, the Internet spurred 2 percent of consumers to request a specific prescription drug from their doctor as compared to 5 percent who were influenced by print ads and 8 percent from TV. Cyber Dialogue projects more than 33.5 million adults will seek health info on-line in 2000.

Among the 89.5 million U.S. adults that indicate they take prescription drugs, 31 percent are currently on-line (9.5 million adults currently taking prescriptions have already ordered products on-line). Findings are based on in-depth interviews with more than 2,700 U.S. adults. The study was fielded in July 1999 and is accurate within ± 2.4 percent at the 95 percent confidence interval. For more information call Grant Sanborn at 212-651-7047 or visit www.cyberdialogue.com.

Hierarchical Bayes (HB) Tools from Sawtooth Software

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Product & Service Update

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research software firm has released a new version of its Remark Web Survey product. Remark Web Survey was designed to be an easy way for users to create and administer interactive forms for the Internet or for an intranet such as on-line surveys, evaluations, registrations, guest books, etc. The software uses wizards to help the user create and publish their forms, so no knowledge of HTML is required. The latest version of this software includes a new feature that allows the survey administrator to password-protect the survey. The administrator can assign a password to each person asked to com-

plete the survey (or test) and can specify how many times a given password can be used for a particular survey. The administrator can also see the password when the survey responses are retrieved for identification purposes.

Remark Web Survey works with Remark Office OMR, Principia's 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. A free, working demonstration version of the product is available at www.PrincipiaProducts.com, or for more information call 800-858-0860.

package that uses DBMS technology and bar coding to track customer response to marketing and advertising efforts. Coupons Plus brings together graphical layout, database, mail merge and bar code technologies to create an application for designing, printing, mailing, redeeming, and tracking coupons and advertising promotion effectiveness. The product makes possible evaluation of print media placement with group bar codes as well as evaluation of direct mail campaigns with individualized bar codes. Coupons Plus also allows for the integration of external data such as customer sales history and transaction details to be integrated with the redemption tracking providing a complete picture of the value of the redeemed coupons to an enterprise.

Coupons Plus features include the ability to design custom layouts for promotional campaigns; create form letters for direct mail campaigns; merge customer information with coupon or letter data to create individualized direct mail documents; create coupon copy for newspaper, periodical or other mass media publication; mark each coupon with a bar code; track redemption of marked coupons to guard against fraud and customer misuse; and generate coupon redemption reports to evaluate effectiveness of advertising and marketing campaigns. For more information call 888-207-2230 or visit www.jvt.com/couponsplus.

In-market testing service from IRI

Information Resources, Inc. (IRI), Chicago, is now offering In-Store Lab, a new in-market testing service that provides real-world reaction to new or enhanced products. Created to meet the needs of consumer packaged goods manufacturers, In-Store Lab is designed to provide a fast read on consumer reaction to new products and in-store merchandising programs. Through the service, IRI will introduce a new product or other marketing variable into select stores with just two weeks lead-time and track weekly

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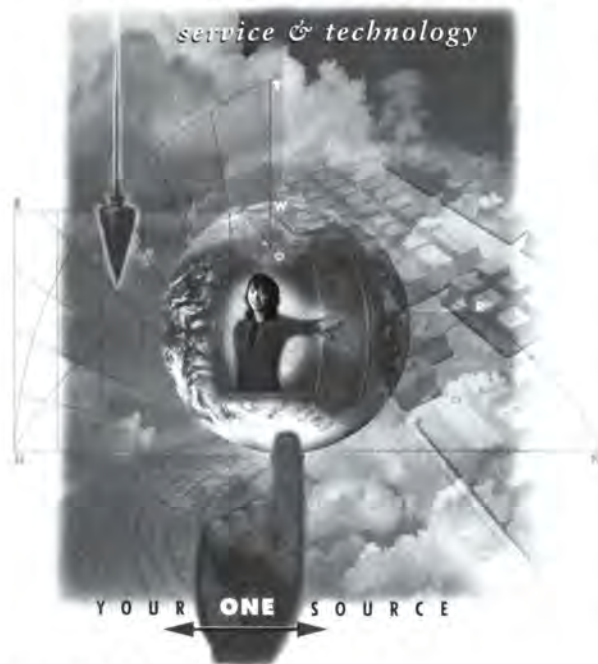
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scanned sales for up to eight weeks. At the same time, IRI's In-Store Lab partner Sorensen Associates will field shopper intercept interviews to explain the "why" behind consumers' purchasing decisions. For more information 312-726-1221 or visit www.infores.com.

ESRI updates ArcInfo

Geographic information system software maker ESRI, Redlands, Calif., has released ArcInfo 8.0.1, a new platform for creating, managing, disseminating, and applying geographic knowledge. The new user interface for ArcInfo 8 introduces a new object-oriented data model that allows users to add behavior, properties, rules, and relationships to their spatial data. The product provides a tool set for high-quality cartographic output. It is also hardware- and software-independent, giving users a number of choices when selecting their hardware and software platform. ArcInfo operates on both the UNIX and NT operating systems. For more information call 800-447-9778 or visit www.esri.com/arcinfo.

New features at usadata.com

USADATA.com, an on-line business information resource, has introduced its new Business Solutions and MediaTarget services on its Web site at www.usadata.com. Business Solutions enables new site visitors to more quickly and easily learn about the information options available on the site. MediaTarget is a compilation of media industry Web sites, including radio, television, newspapers and magazines, from over 60 different local markets. The regularly updated MediaTarget gives marketers and researchers a first point of contact for determining their media options. The company has also announced a partnership with Dallas-based 10K Wizard, enabling usadata.com visitors to access real-time Securities and Exchange Commission filings, and

to search the documents for specific keywords using 10K Wizard's search capabilities.

Reports profile consumer thoughts on fresh produce

The Packer, a newspaper serving the fresh produce industry, has released findings from its Fresh Trends 2000 ongoing consumer research survey. In

addition to consumption and purchasing and consumption information, the survey asked consumers to compare branded vs. non-branded produce. It also queried respondents about Internet usage and awareness of nutrition guidelines and product promotions such as the Five-a-Day program. Highlights are available in a 72-page magazine. An extended report including demographic data is also available. For more information call Carol Cox at 913-438-8700.



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Research Industry News

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RealBroadcast Networks. The service determined that for these five streaming content providers, Internet listeners spent nearly a total of 1.4 million hours tuned to Internet audio during November.

Focus Portland, a Beaverton, Ore.-based subsidiary of InfoTek Research, has opened a new focus group facility in Beaverton. The facility includes three oversized group rooms, one large multipurpose room, and viewing rooms and lounges. For more information call 503-350-4829 or visit www.focusportland.com.

Harris Interactive, a Rochester, N.Y., Internet research firm, has released the summary of its client base for Internet research. Between July 1 and December 31, 1999, Harris Interactive's total number of clients for Internet-based research expanded from 47 to 186.

Charlottesville, Va.-based software firm **AbTech Corporation** has changed its corporate name to MarketMiner Inc., a nod to its MarketMiner Express 3.0 automated data mining tool

Sausalito, Calif.-based **MarketTools, Inc.**, an application service provider for

the e-research industry, has closed \$30 million in financing, including \$25 million in equity and an additional \$5 million in lease and debt financing. Separately, MyPoints.com, a developer of Internet direct marketing and loyalty infrastructure, has chosen MarketTools to capture opinions, attitudes, and buying preferences from a targeted audience of more than 4.2 million consumers. In other news, the firm has finalized a two-way partnership agreement with marketing consulting firm Peppers and Rogers Group in which Peppers and Rogers will utilize MarketTools as the on-line market research platform of choice for their customers. In addition, MarketTools will become a Peppers and Rogers alliance partner.

Nielsen/NetRatings, a source of information on Internet use and advertising, will be offered to French customers via a joint venture, called Mediametrie eRatings.com, which is a partnership between Mediametrie, the French audience measurement and survey company, NetRatings, Inc., and ACNielsen Corporation. Mediametrie eRatings.com will begin measuring the French Internet marketplace in the second quarter of 2000. The new Mediametrie eRatings.com venture is jointly owned by Mediametrie (50 percent), NetRatings (30 percent) and ACNielsen eRatings.com (20 percent).

Separately, Nielsen Media Research and NetRatings, Inc. has announced plans to begin Internet audience measurement in Canada. The Nielsen/NetRatings service will begin reporting data from its Canadian research panel in the second quarter of 2000.

Focusing on quantifying and understanding the Internet-based business-to-business market, Boston-based research firm **The Delphi Group** has released the findings of a survey among end-users and vendors of Internet-based business-to-business tools. A summary of the findings is available at www.delphigroup.com/e-biz-report.

Schaumburg, Ill.-based **ACNielsen U.S.**, an operating unit of ACNielsen Corporation has announced an agreement with Rite Aid that makes ACNielsen a primary insights supplier to the nation's third-largest drug retailer. Rite Aid will use ACNielsen SCANT-RACK data as its core source of non-prescription product sales information. The company also plans to utilize insights from the ACNielsen Homescan consumer panel and will have an ACNielsen client service representative on-site at Rite Aid full time.

New York-based research firm **FIND/SVP** has signed a collaboration agreement to develop find.com, a new Web site that will contain search engine technology, content and features. As part of the agreement, FIND/SVP is also assigning the domain name find.com and licensing the use of certain rights to the trademark "FIND" to a new company, Find.com, Inc., a wholly-owned subsidiary of idealab!, a creator and operator of Internet businesses. Under the terms of the agreement, FIND/SVP is receiving consideration in the form of cash, stock, and royalties. As an initial result of the transaction, FIND/SVP expects to record pretax income of approximately \$1.2 million in the fourth quarter of 1999.

SPSS Inc., Chicago, and **Acxiom** have joined forces to create a customer relationship management (CRM) solution by combining the Acxiom Data Network with SPSS data mining technology. Effective immediately, this rela-

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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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tionship combines SPSS' data mining software products with Acxiom's consumer and business marketing data. New versions of SPSS' flagship data mining product will be enabled for the

Acxiom Data Network, a data delivery system that provides access to Acxiom's InfoBase data products. Separately, SPSS has completed an OEM agreement with Hyperion under which SPSS

will provide Hyperion with forecasting technologies to extend the analytical capabilities of Hyperion Essbase OLAP Server. Under the agreement, SPSS will integrate its recently released DecisionTime and WhatIf? Forecasting products with Hyperion Essbase, a cross-platform open OLAP server.

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Minneapolis-based Net Perceptions, Inc., a supplier of real-time personalization solutions, has signed a definitive agreement to acquire privately-held KDI, Inc. (Knowledge Discovery One), a provider of data analysis solutions for multi-channel and dot.com retailers.

Meta Information Services, Inc., has moved to 11819 K St., Suite 200, Sacramento, Calif., 95814. Phone 916-325-1220. Fax 916-325-1224.

A new Web site, www.markinetics.com, showcases the services of Marietta, Ohio-based research firm **Markinetics Inc.** and subsidiaries Markinetics/Fleet Solutions Alliance LLC and Call Center LLC.

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Seattle-based **DeepCanyon** has formed a partnership agreement with **Forrester Research, Inc.** to make selected Forrester reports available through the DeepCanyon Web site (www.deepcanyon.com). Under the terms of the agreement, DeepCanyon's site will serve as a new distribution point for Forrester's baseline packages — bundles of five reports designed to provide comprehensive intelligence on a given technology topic. Forrester's research reports have historically been available only to its subscribers.

InterSurvey, a Palo Alto, Calif., research firm, has signed an agreement with **iVillage.com**, an on-line women's community, to be the exclusive provider of polling data on women voters and the 2000 presidential election. The polls will track the presidential race and issues of interest as part of the new interactive Election 2000 Channel on **iVillage.com**. Separately, the firm also announced that it has closed a second round of financing of \$36 million. The funds will be used to expand the firm's consumer research panel.

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Duck Stamp

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environmental causes — what was important to them, why they were or

were not involved — we jumped into different appeals,” Ball says. “We had two sets of three so we split the room in half and had each person look at all of them. We wanted them to judge

which ads made them want to act, which turned them off, and what the elements were that made them want to act or not act.”

Once a range of appeals was identified, the focus group questioning centered on isolating the elements that made people change their minds. “We take them from being dead set against the program and we watch to see what the key elements are that make them change their mind and what they repeat back to you about that. And then you see where it is that they are absolutely sold — that’s where the certificate came from,” Ball says.

Respondents were very clear that the ads shouldn’t feature people enjoying the wetlands. “We had some ads that showed people in the wetlands — for example, a family riding bicycles through them — and they were very negatively received. People didn’t want to see people in the wetlands. They were seen as a sacred thing, which surprised us. Most of the wetlands out there have people around them because they are often in parks but the respondents saw it differently: let’s save this pristine resource.”

The focus on wetlands as a water filtration system also emerged from the research. Respondent interest faded if the ads focused on preserving habitat for ducks and other migratory waterfowl.

Credibility was also key. “Respondents wanted to know who was behind the program and why, and where does the money go. So we knew from that discussion that we had to build that information into the ads,” Ball says. However, the government involvement couldn’t be overplayed. The research uncovered a 50/50 split between respondents who thought government involvement in the program was a good thing and those who thought it was a problem.

The print ads focus on wetlands’ ability to filter water (one acre can purify 7.3 million gallons of water per year) and then segue into the Duck Stamp Program’s long history of preserving wetlands and its efficient use of funding. At the close, readers are invited to participate by calling the toll-free number to purchase a certificate.

Unmet needs

Ball uses his firm’s approach centers



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on identifying respondents' unmet needs, finding the elements in the product and its advertising that can meet those needs and spur a purchase. In the research on the Duck Stamp Program, one unmet need was uncovered among respondents with a concern for water quality. They wanted to help but didn't want to spend a lot of money and didn't want to be seen as supporting environmental organizations they viewed as politically extreme.

As it turned out, while almost everyone expressed concern about the environment, few were willing to help protect it without receiving some direct benefit (other than clean water). In this case that benefit took the form of a frameable certificate.

Previous work on philanthropic issues has shown Ball that people aren't as selfless as they would like to think they are. In the end, they want something from their act of kindness, whether it's a good feeling inside, or in this case, a certificate they can parade before friends as proof of their environmental awareness. "We had people describing how they would take friends over and show the certificate to them, almost as if they had bragging rights. That was one of the critical elements that came out of the research."

Early stages

The advertising is still in the early stages. The print ads have appeared in *Reader's Digest* (to capture a broad readership), and *National Geographic* and *Audubon* (to reach a well-educated, environmentally concerned audience). TV spots have been run in San Diego and Baltimore.

The ads are also designed to drive traffic to www.savewetlands.org, a Web site that provides information on the program and also serves as another vehicle for purchasing the stamps.

"In the markets that we have the test going we'll be doing telephone surveys to measure awareness and perceptions of the program," Ball says. "*Reader's Digest* is doing a study for us on that ad right now to see how people reacted to it. And we are of course tracking the sales process. It's all direct response so we can tell when an ad ran and how the response mechanism is working."

"When [The Ball Group] came back to us with test ads," Wendy says, "the feeling among some of the people was that they had concentrated too much on the environment and not explaining the link to the Duck Stamp Program. This is an old program and the people who are connected with it are very proud of it. But we're pleased with the campaign."

Contribute every year

If everything goes as planned,

hunters and stamp collectors won't be the only ones making an annual duck stamp purchases. "We discovered a huge contingent who are concerned about the environment, especially air and water quality, and they believed that wetlands are a primary water filter for us, and felt that a \$30 contribution was not only attractive but one that they would actively support again and again. We had people say, 'Now that I know about this I'll contribute money every year.'" Ball says. **74**

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Chevron

continued from p. 21
concern.”

Wide-ranging interview

Under the Communicus approach, respondents are first contacted by telephone for a wide-ranging interview that is structured to mask the study's sponsor and its advertising focus. Respondents provide attribute ratings, overall impressions, and purchase information for a number of companies and their advertising.

The same people are recontacted a year later to participate in a similar interview, this time computer-aided, during which they are briefly shown ads which have been edited to eliminate sponsor identification. “Using the reinterview approach allows us to have a more sensitive measure of the effectiveness of the ads in terms of attitude change,” Winters says.

“With that data,” says Robert Judson, president, of Communicus Inc., “you have a sample of people you

have tracked over time, vis à vis your objective. You know where they started and where they ended up and you know if they saw any ad for your campaign in any medium. So with those data you can look at people who had and had not seen the ads and see how they changed when they saw the campaign.”

In testing print ads or another still medium, Communicus uses a photograph of the ad. “There you let time do the masking,” Judson says. “You show it to the respondent at a quick exposure duration, which you have to calibrate to the individual. You show it to them so fast that if they see it, they won't learn anything, but slow enough that if they have seen it before, they'll recognize it.”

If the respondent says he or she has seen an ad, they are asked additional questions to make sure they can correctly identify its sponsor, which



becomes the proved awareness score for each commercial.

Awareness of one or more commercials or print ads puts a respondent into the campaign-aware group and they can then be compared in terms of variables such as attribute ratings,

brand bought last, favorability ratings, etc.

“It's the difference in the change scores between the aware group and the change score of the unaware group on these dependent variables that dictates whether the campaign has had an effect,” Winters says. “And then within that, we look at which commercials or print ads have had different scores on awareness, sponsor ID, and the effects on the dependent variables and also how the scores compare to Communicus norms. That measure lets us make all kinds of decisions about campaign effectiveness and specific execution effectiveness within the campaign.”

TV, print interaction

In addition to measuring the overall campaign, Chevron also examines how the TV ads and print ads interact. As it turns out, they work just fine together. “The two media are equally persuasive,” says Jack Moore, president of Communicus affiliate Carmelita Inc., who has also worked on the Chevron campaign research. “Chevron couldn't afford to reach the people they reach with print ads via TV. They need the print to reach some people and TV to reach others.”

The research lets Chevron know which executions perform better than others, so it helps determine the allocation of media dollars, Winters says. “It certainly helps us understand how this message positions us in the minds of people. Independent of Communicus, when we do tracking studies, we find out that in markets where we have the People Do campaign, we are positioned in people's minds as the number one oil firm with regard to the environment. Where we don't do the advertising, we aren't

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People Do



Keep it fresh: Though Chevron has used the same case history approach, it has kept the campaign fresh by using several new executions. (Ad reprinted with permission of Chevron Corporation.)

thought of in that way.”

Impressions

Moore says the Chevron campaign has been very successful, not just at enhancing the impressions of people who were already favorably disposed toward Chevron but also at reaching those who had expressed an unfavorable impression. “A lot of consumers express a high degree of interest in the environment, so firms advertising their environmental awareness have an audience that is prepared to think well of companies who give a credible message about their participation in preserving the environment,” he says.

“The biggest problem is credibility. Most people are not prepared to believe statements from oil companies. If the oil company comes out and says ‘We love the environment,’ there is a tendency to reject it. But if they come out and say, ‘Here is something very specific we did,’ the interest in the case itself brings people into it. And if it is done in a credible fashion, it can be very effective, as this campaign has shown.”

Credibility is supremely important, especially with this kind of advertising, Moore says, because there is a tendency for the company to build expectations that it can’t meet, which may do


more damage than having run no campaign at all. He cites an example of an airline that advertised its wonderful in-flight cabin service just as its flight attendants were staging a work slowdown. “The people who saw the ads got twice as mad as they otherwise might have since they experienced the exact opposite of wonderful cabin service.”

Also important, Judson says, is the fact that Chevron has had the disci-

pline to stay with the program for a number of years. “When people see that ad format, they are well able to associate it with Chevron, whereas if you don’t have the discipline and you change approaches, it’s hard to build up that kind of advertising equity. They keep it fresh with new executions but they’ve been able to maintain a campaign architecture.”

Employee pride

The advertising has also had an impact on another audience — those who put the “people” in the People Do slogan — by making Chevron’s environmen-

tal concern a source of pride for its employees, Winters says. “Because we are out front with that [environmental] message, we have established even more vigilance in terms of doing what we say we are doing in our advertising. I think the employees feel a sense of pride about that. A lot of the stories for the ads come from the employees and things they do to be consistent with this positioning.” 

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Names of Note

continued from p. 10

J. Reckner Associates, Inc., a Philadelphia-area research firm, has

been named to the board of directors for the MidAtlantic Employer's Association. Separately, JRA has promoted **Barbara Ogrizek** to director of field services; and **Alice**

Keeley to mall manager and **Jennifer Schmidt** to mall supervisor at the firm's Montgomeryville Mall facility.

The Arbitron Company, New York, has named **Dennis Seely** director of marketing for radio station services. In addition, **Bill Rose** has been promoted to vice president and general manager of Arbitron Internet Information Services (formerly called Arbitron NewMedia).

Information Resources, Inc., Chicago, has named **David Shanker** executive vice president - retail client services.

Ken Long has joined *The Pat Henry Group*, a Cleveland-based



Long

research firm, as director of research operations.

Wainhouse Research, Brookline, Mass., has named **Andrew Nilssen** senior researcher and market analyst.

SAS Institute, a Cary, N.C., integrated data warehousing and decision support firm, has named **Paul Bachteal** director of marketing for North America.

Craig Kelly has been named marketing director at *SunTrust Banks*, Atlanta. His responsibilities include advertising, direct marketing, product management and development, and marketing research.

Palo Alto, Calif.-based *InterSurvey* has named **Marc Litvinoff** president and chief oper-

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ating officer. **Doss Struse** is the company's new senior vice president, marketing and strategy.

Marcia Leishman has joined Horsham, Pa.-based research firm *Taylor Nelson Sofres Intersearch* as vice president.

Greenwich, Conn.-based *NFO Worldwide, Inc.* has named **Sheryl Olitzky** president of Migliara/Kaplan Associates (MK), NFO's health care research specialty company. Olitzky, formerly executive vice president for MK, replaces **Jeffrey T. Whittle**, newly named NFO group president North America.

Stratford Associates Marketing Research, Inc., Needham, Mass., has promoted **Miriam Konz** to senior consultant; **Jessica Bolger** to consultant; and **Lea Ben-Akiva** to project director.

AFFINA, a Peoria, Ill., customer relationship management firm, has named **Christine Kowalczyk** president and general manager of *AFFINA Select*, the firm's newly-formed business unit.

Greg S. Bonner has been named director of the new Automotive Vehicle Forecasting division of *Providata Automotive*, an Ann Arbor, Mich., management consulting/market research firm focused on the global automotive industry.

The Arbitron Company, New York, has named **Julius Litman** vice president of product development, Arbitron Internet Information Services. In this newly created position, Litman is responsible for the development of SiteScore, a Web-based syndicated survey.

Chris Ferrato has joined *Survey.com*, a San Jose, Calif., research firm, as manager of consumer sales.

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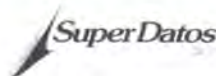
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Trade Talk

continued from p. 90

the commercials against the 297 PhaseOne Communication Variables without knowledge of scores. Then the results were compared to standardized consumer test scores utilizing an independent statistician to provide multivariate analysis.

The even distribution of the results, as shown in the scatter plot, gave PhaseOne a high level of confidence that its variables did indeed help explain likability.

What drives likability?

PhaseOne found five communication elements that are key to developing likable ads:

- **Entertainment** — Entertainment is the foundation of likable ads. Yet, entertainment is not enough on its own.
- **Brand integration** — Entertainment must then be integrated with the brand and the brand message like the fibers of a rope.
- **Meaningful differentiation** — It is also important to differentiate the brand in a way that is relevant and meaningful to consumers.
- **Freedom from turn-offs** — What makes ads


unlikable are turn-offs that offend viewers such as insulting language, elements that trigger disgust, or appeals to negative emotions such as fear and resentment.

- **Freedom from communication issues** — Communication issues (such as trying to do too much, jumping around, or asking viewers to supply important strategic information) lead to unlikable ads.

Relationship among key measures

The next step was to determine if there is any relationship between the three key measures provided by consumer testing services today — persuasion, recall, and likability. From a 3x3-correlation matrix PhaseOne found an extremely strong relationship between persuasion and likability (at the .011 significance level). However, no correlation was found between either persuasion or likability with recall.

Further analysis found significant overlap between many of the variables that drive performance in both likability and persuasion. These overlapping variables are those essential to communicating a strong brand message.

Being likable or garnering high likability scores means a lot more than just being warm and fuzzy. This study has revealed just how complex the road to achieving likability is. 

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Trade Talk

By Joseph Rydholm, QMRR editor

Study examines ad likability

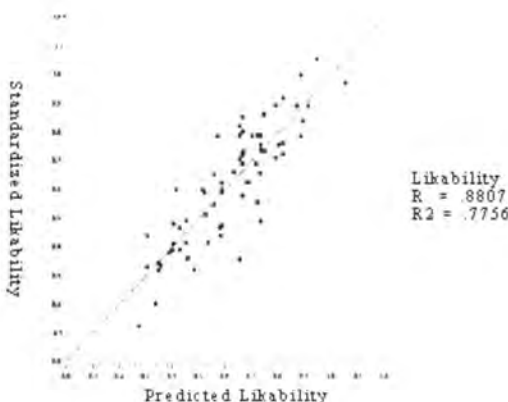
Editor's note: This month we have a guest columnist, of a sort. In conjunction with our advertising research issue, I contacted the folks at PhaseOne, a Beverly Hills research firm, for an update on their research into likability in advertising. Rather than edit the material and attach it to one of the ad research-related articles in this issue as a sidebar, we're running it here in its entirety.

Advertising is undergoing a transition, according to findings from PhaseOne, a Beverly Hills, Calif., research firm. Advertisers are having increased difficulty achieving superior performance on the recall and persuasion measures. At the same time, there is a growing regard for creativity as the way to break through and differentiate parity brands.

PhaseOne suspected that likability played an important role in this transition. Therefore, the firm undertook a study to determine what makes an ad likable, and what impact likability has on persuasion and recall. The findings were very different from what the industry currently believes drives

likability.

The study included 70 commercials that covered



21 brands, seven product categories, and scores from four testing services. Trained analysts coded continued on p. 89

Non Sequitur



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Raleigh.....	June 7-9	San Francisco.....	Oct 23-25
New York.....	June 26-28	Miami.....	Nov 27-29
Cincinnati.....	July 19-21	New Orleans.....	Dec 18-20

104. Questionnaire Construction Workshop

Cincinnati.....	Mar 6-8	Baltimore.....	Jul 31 - Aug 2
Los Angeles.....	April 10-12	New York.....	Sep 18-20
Atlanta.....	May 15-17	San Francisco.....	Oct 30 - Nov 1
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105. Designing Questionnaires for Specific Marketing Research Applications

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Atlanta.....	May 18-19	San Francisco.....	Nov 2-3
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106. Online/Internet Research

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201. Qualitative Research Methods

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202. Focus Group Moderator Training

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Cincinnati.....	June 13-16	Cincinnati.....	Nov 7-10
Cincinnati.....	July 24-27	Cincinnati.....	Dec 12-15

203. Focus Group Applications

Cincinnati.....	Feb 28 - Mar 1	Cincinnati.....	Oct 16-18
Cincinnati.....	June 19-21		

204. Qualitative Research Reports

Cincinnati.....	Mar 2-3	Cincinnati.....	Oct 19-20
Cincinnati.....	June 22-23		

205. Qualitative Research with Children

New York.....	Mar 31	Chicago.....	Oct 5
Cincinnati.....	July 28		

301. Writing Actionable Marketing Research Reports

Cincinnati.....	Mar 20-22	Denver.....	Aug 16-18
San Francisco.....	May 1-3	Chicago.....	Sep 25-27
Atlanta.....	Jun 14-16	Boston.....	Nov 13-15
New York.....	July 10-12		

302. Stand-up Presentation of Marketing Information

San Francisco.....	May 4-5	Chicago.....	Sep 28-29
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401. Managing Marketing Research

Cincinnati.....	Mar 23-24	Boston.....	Nov 16-17
New York.....	July 13-14		

402. Increasing the ROI from Marketing Research

New York.....	Mar 31	Cincinnati.....	Dec 15
Chicago.....	Jul 27		

501. Applications of Marketing Research

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Chicago.....	May 11-12	San Francisco.....	Oct 26-27
New York.....	June 29-30	New Orleans.....	Dec 21-22

502. Product Research

New York.....	Mar 6-7	San Francisco.....	Aug 22-23
Atlanta.....	May 22-23	Cincinnati.....	Nov 14-15

504. Advertising Research

New York.....	May 1-2	Atlanta.....	Dec 4-5
Cincinnati.....	July 31 - Aug 1		

505. Market Segmentation Research

New York.....	May 3-4	Cincinnati.....	Aug 2-3
San Francisco.....	June 19-20	Atlanta.....	Dec 6-7

506. Customer Satisfaction Research

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507. Analysis & Interpretation of Customer Satisfaction Data

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San Francisco.....	June 14-15	Cincinnati.....	Nov 2-3

508. Positioning Research

New York.....	May 5	Cincinnati.....	Aug 4
San Francisco.....	June 21	Atlanta.....	Dec 8

509. Pricing Research

Atlanta.....	May 24	Cincinnati.....	Nov 16
San Francisco.....	Aug 25		

601. Data Analysis for Marketing Research: The Fundamentals

Cincinnati.....	Mar 14-15	Chicago.....	Oct 5-6
Atlanta.....	Jun 12-13	New York.....	Nov 7-8
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602. Tools & Techniques of Data Analysis

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New York.....	Apr 25-28	New York.....	Oct 3-6
Las Vegas.....	May 30 - June 2	Los Angeles.....	Nov 7-10
Chicago.....	Jul 18-21	Raleigh.....	Dec 12-15

603. Practical Multivariate Analysis

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Las Vegas.....	June 6-9	Atlanta.....	Nov 28 - Dec 1
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604. Data Analysis: A Comprehensive Hands-on PC Based Workshop

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Cincinnati.....	Aug 16-18		

605. Practical Conjoint Analysis & Discrete Choice Modeling

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606. Data Mining Tools & Applications

San Francisco.....	Apr 19-20	Atlanta.....	Oct 26-27
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701. International Marketing Research

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801. Using Marketing Information for Better Decision Making

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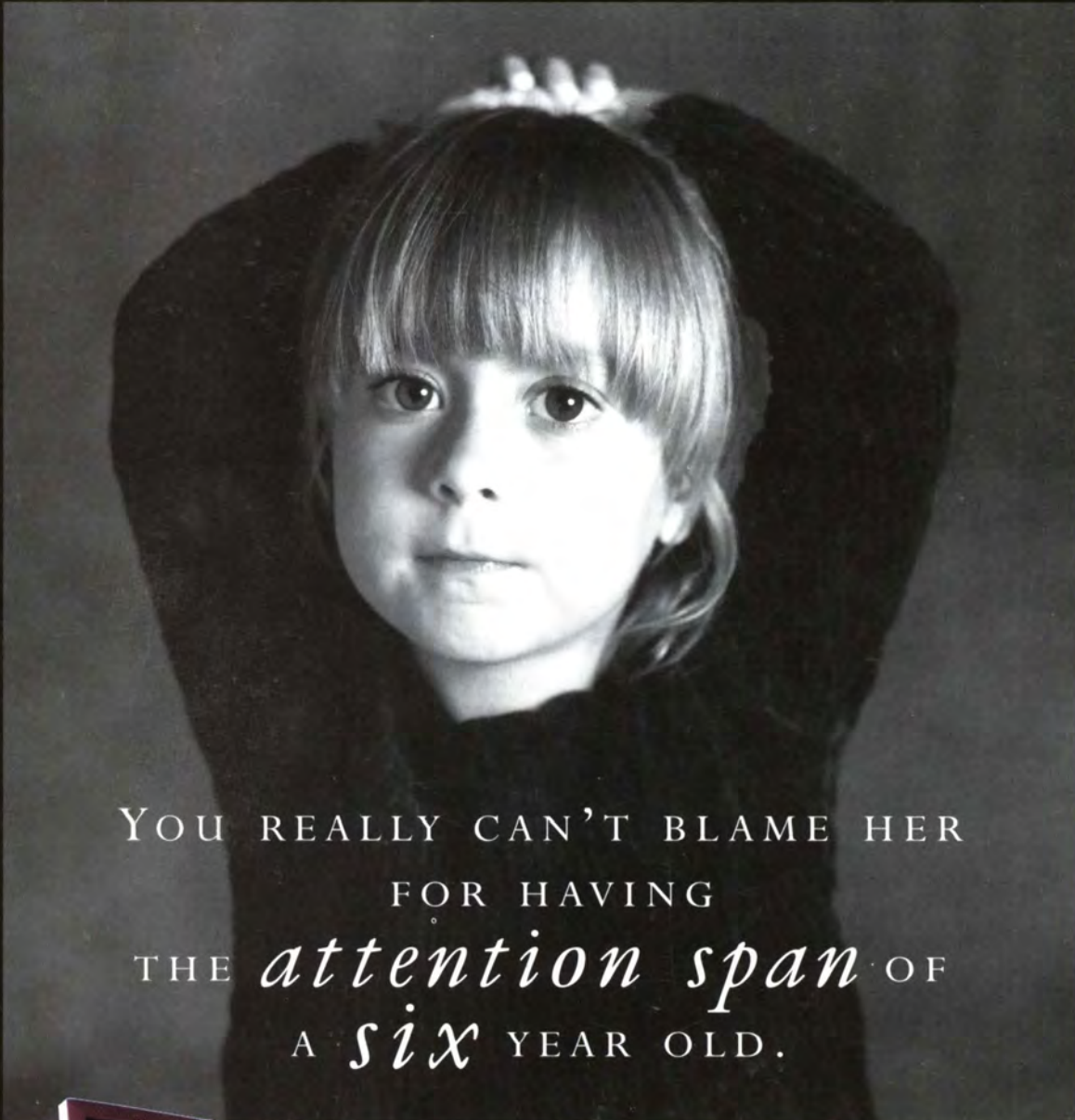
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