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Marketing Research Review

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May 2000

Working with the Kano method

**Examining the role
of advertising**

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combatting the effect
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Private labels find public favor

According to results from the 1999 MarketLink Shopper Survey, a majority of survey participants (61 percent) consider the taste of private label food products to be "as good as name brands." One in four consumers regard the taste of private label foods to be "inferior to name brands" — the lowest percent with these negative attitudes in five years. MarketLink, a Thomasville, Ga., research firm, conducts the Shopper Survey each year to examine food shopping attitudes and behavior and the role of brands in food shopping decisions.



The 1999 survey reveals a continuation of a rebound in the claimed importance of private label brands that was first evidenced in 1998's study.

Kids not bored with board games

Research by Simmons Market Research Bureau, New York, shows that the No. 1 type of toy owned by kids today is a traditional board game. Even in this high-tech age, the majority of children (88 percent) said they like to play most with board games. And what topped their lists? Monopoly, Guess Who and Twister (which they play with friends or family up to five times a week).

When they are finished with their board games, American kids turn to a variety of traditional and high-tech toys. Here are their top picks: electronic home video games (73 percent); crayons (72 percent); Beanie Babies (60 percent); stuffed animals (60 percent); puzzles (58 percent); hand-held video games (53 percent); and dolls (51 percent).

When it's time to plead for a new toy, youngsters first turn to mom. The majority of kids polled said that she's the one who comes home most often with the toys. Just over half said that dad bears the toys, with grandma or grandpa following close behind. Youngsters as a whole may like TV, but the ads they see don't always send them shopping. A quarter of those polled said TV ads make them buy the toys. For more information call 212-373-8900.



The percent of consumers who regard private label brands as either very or somewhat important now stands at 56 percent — the highest percent in five

years. Meanwhile, the percent of consumers who regard them as either not

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Cleveland loves its baseball

According to a new study by New York-based Scarborough Sports Marketing, Cleveland (36 percent), St. Louis (31 percent) and Atlanta (25 percent) score the highest concentration of avid major league baseball (MLB) fans. A quarter or more of the adult population in these three cities have a "high level of interest" in the national pastime, contrasting with a national average of 15 percent.



How do cities without a home team rank? Major league baseball is also popular (and above the national average) in a few select cities including Hartford, Conn., with almost one-fifth (17 percent) of its adult population very interested in major league baseball; differing by only one percentage point is Birmingham, Ala. (16 percent).

The major league city with the lowest percentage of avid baseball fans is Detroit (6 percent); Minneapolis (8 percent) followed closely. The lowest ranking cities without a major league team are Salt Lake City (4 percent); Lexington, Ky. (5 percent); and Grand Rapids, Mich. (6 percent).

The study also revealed that MLB fans tend to be male (63 percent), married (58 percent) and a large portion of the group falls between the ages of 35-54 (40 percent). In addition, over half (54 percent) of baseball fans have attended college and more than two-thirds (67 percent) own their residence.

The data for this report was compiled from August 1998 to September 1999 from release two of the 1999 Scarborough 12-month database. Scarborough Sports Marketing measures local market consumer and lifestyle information by interviewing over 170,000 adults (ages 18+) in 64 U.S. markets including all professional sports markets.

Top 10 Most-Avid Baseball Markets (percent of adult population claiming a "high level of interest" in baseball)

1. Cleveland 36%
2. St. Louis 31%
3. Atlanta 25%
4. San Diego 24%
5. New York 21%
6. Baltimore 19%
7. Seattle 18%
8. Hartford, Conn. 17%
9. Denver 17%
10. Boston 16%

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Names of Note

Astrid Proboll has been named director of marketing at *Socratic/Modalis Research Technologies*, San Francisco.



Proboll

Efird

Fred Efird has been named president of *RestaurantSurveys.com*, the on-line research division of *The Dohring Co.*, Glendale, Calif.

The Atlanta office of *Eagle*

Research has announced a number of staff additions and promotions: **Marie Brown** has been promoted to qualitative manager; **Bobby Griffin** has been promoted to qualitative facilities coordinator; **Donna Barnhill** has been named research analyst; **Dan Spencer** has been named coder/editor; **Constance Piperno** has been promoted to qualitative director; and **Shelandria Morgan** and **Foluke Blackwell** have been promoted to supervisor in the quantitative research department. In the Denver office of *Eagle Research*, **Michael Sebastian** has been promoted to quantitative supervisor and **Nichole Kilbourn** has been promoted to office manager.

Merrie Thorpe and **Grete Stevens** have joined *Stratford Associates*

Marketing Research, Inc. as consultants in its Needham, Massachusetts office.

Knowledge Systems & Research, Syracuse, N.Y., has named **Micheline Magnotta** research analyst. In addition,



Magnotta

Hynes

Elaine Hynes has been named director of strategic analysis and senior consultant.

Tracy Schoenadel has joined *Taylor Nelson Sofres Intersearch*, White Plains, N.Y. as a vice president, sports, events and sponsorship. **Charles Humenn** has been named vice president, media and entertainment.

Moore Response Marketing Services, Bannockburn, Ill., has named



Swager

Doug Swager director of analytical services.

Creative Research Services, Inc. has named **Frank McGinn** senior vice president. McGinn will direct the account services team of the firm's newly opened Dallas office. In addition, **Lisa Bell** has been named project

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Annual IT services industry studies

Atlanta-based Specifics, Inc. has initiated distribution of participant packages for its annual IT Services Industry Studies. To be published in May 2000 are:

- IT Services Productivity, Practices, and Trends (13th Edition)
- IT Services Executive and Management Compensation (4th Edition)
- IT Services Compensation and Billing Practices (6th Edition)

Conducted annually, these three studies examine the highly competitive IT services industry. Additionally, the studies will be available free of charge for participating companies. For more information visit www.specifics.com. You can

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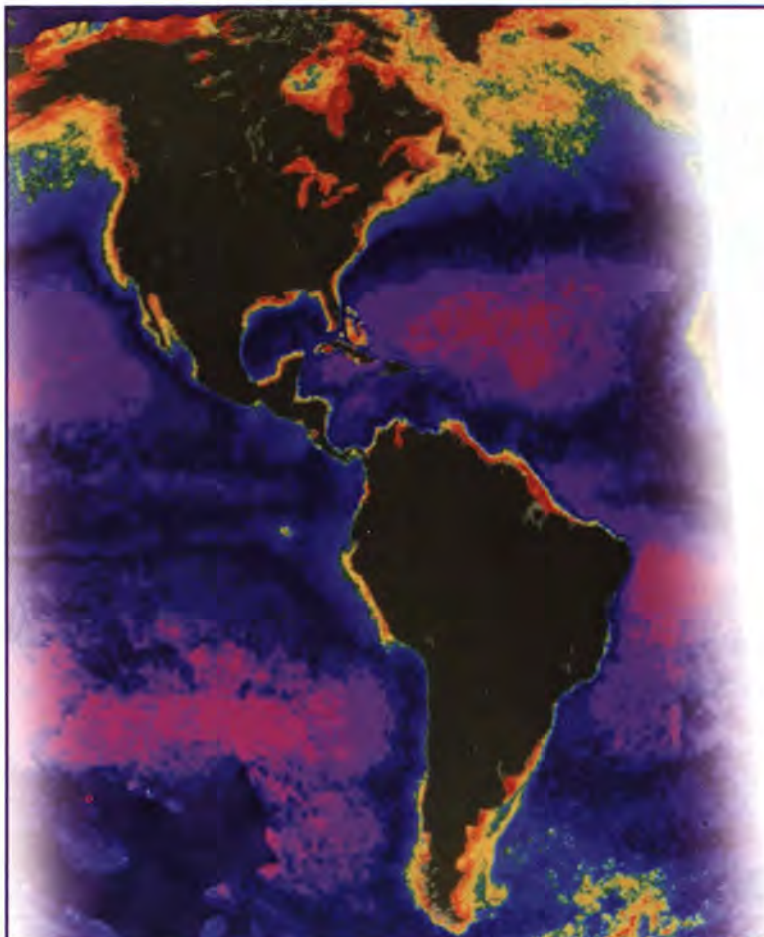
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information contact William M. Bailey at 407-889-5632.

Web site serves as data warehouse

1010 Data, Inc., a New York application service provider, has launched its Web-based database subscription service. The service allows end users to analyze large databases in Internet time — with little or no involvement of IT professionals. The software runs on the company's servers. Any customer can access 1010 Data's service with a standard Web browser. Using the service, a user uploads their data to 1010 Data's secure servers and can instantly query the data, generate cross-tabulations, charts, reports and combine their data

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SPSS MR SEMINARS: SPSS MR is offering an ongoing seminar series at its New York offices on the second and fourth Wednesday of each month. Mornings will showcase designing and running Web surveys; afternoons will outline advanced tabulation and interactive analysis options. For more information call 212-447-5300 or visit www.spss.com/spssmr.

MYSTERY SHOPPING CONFERENCE: The Mystery Shopping Providers Association (MSPA) will hold its annual conference on May 17-20 at the Wyndham Garden Hotel in Key Biscayne, Fla. The conference will include seminars, workshops and social activities. For more information call Kathleen McHugh at 847-375-4842 or visit www.mysteryshop.org.

AAPOR CONFERENCE: The American Association for Public Opinion Research (AAPOR) will hold its annual conference on May 18-21 in Portland, Ore. For more information visit www.aapor.org.

ADVANCED TECHNIQUES FORUM: The American Marketing Association will hold

its Advanced Research Techniques Forum (ART Forum) on June 4-7 at the Marriott Hotel in Monterey, Calif. For more information visit www.ama.org.

FROST & SULLIVAN CONFERENCE: Frost & Sullivan will hold its third annual Advanced Marketing Research Conference and Exhibition on June 5-8 at the Alexis Park Resort and Spa in Las Vegas. For more information call Bruce Hirsch at 212-964-7000 ext. 275 or visit www.frost.com/conferences/MRT.

PMRS ANNUAL CONFERENCE: The Professional Marketing Research Society (PMRS), North York, Ontario, will hold its annual conference from June 5-9 at the Westin Harbour Castle Conference Centre, Toronto. For more information call 888-815-PMRS or visit www.pmrs-aprm.com.

MRA ANNUAL CONFERENCE: The Marketing Research Association (MRA) will hold its 42nd annual conference on June 7-9 at the Westin Hotel in Seattle. For more information visit www.mra-net.org.

Gladson & Associates, a Lisle, Ill., product database firm, has acquired Chicago-based **Information Resources, Inc.**'s National Product Library. The two firms have formed a joint venture to serve the e-commerce needs of each company's customers. Separately, IRI has reached an agreement with Stater Bros. Markets in which the grocery store chain will provide IRI with census-level data from its stores. In other news, IRI has opened an office in Bentonville, Ark., to serve its local consumer packaged goods clients. In addition, IRI and Procter & Gamble have signed an agreement in which IRI will continue to be the company's primary provider of UPC-based research and insight in the U.S.

Field & Focus, a Lake Worth, Fla., research firm, has added a DSL line for ActiveGroup access. For more information call Sherry Lane at 800-881-8301.

Mature Marketing and Research, Boston, has published the results of a pilot survey conducted with the 50+ population. Survey categories include automotive, financial services, (banking/investment), computers and Internet usage, fast-food/restaurant usage, health care, retirement plans, vacation planning/hotel selection. For a free copy, send an e-mail to Les Harris at mmrharris@aol.com or a fax to 617-723-1254.

Blauw Marktonderzoek, a Netherlands-based research firm, has joined the INRA (Europe) network.

E-tabs, formerly ISPC, has moved to 4 Gresham Gardens, London, NW11 8PB, England.

Canada Market Research, Toronto, has changed its name to **IFOP CMR**. The change reflects the sale last fall of CMR to IFOP, a French research concern.

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TRAVEL RESEARCH CONFERENCE: The Travel and Tourism Research Association will hold its annual conference on June 11-14 in the San Fernando Valley, Calif. For more information call Mark Okrant at 603-535-2364 or visit www.ttra.com.

WEB/ON-LINE SURVEY SEMINARS: The Institute for International Research will hold an installment of its Web-based Surveys and Online Research Seminar Series at the Hilton San Diego on June 12-14. Core issues such as reliability, validity, response rates, projectability and anonymity will be addressed. For more information call 888-670-8200 or visit www.iir-ny.com.

FOCUS GROUP BOOT CAMP: On June 16-17, the Greeley Institute will present the "Focus Group Boot Camp," a workshop for managers who use or authorize use of focus group research. For more information call 617-946-0755.

ON-LINE RESEARCH SUMMIT: IQPC will

hold an on-line research and Web survey summit on June 27-28 at the Ambassador West, Chicago. For more information call 800-882-8684 or visit www.iqpc.com.

ETHNIC MARKETING CONFERENCE: The European Society for Opinion and Marketing Research (ESOMAR) will hold its Ethnic Marketing Conference on July 2-4 at the Paris Hilton Hotel. For more information visit www.esomar.nl.

CLARITAS CONFERENCE: The annual Claritas Precision Marketing Conference will be held on July 16-19 at the Loews Coronado Bay Resort in San Diego. With the recent transfer of National Decision Systems (NDS) to an operating division of Claritas, each company's annual users' conference will be combined. Breakout sessions will feature success stories, case studies and industry-specific marketing solutions. For more information contact Melissa Barry at 800-866-6510, ext. 575, or at mbarry@claritas.com or visit www.claritas.com.

The Broadcastweb Network, a Maine-based firm that owns and operates several Internet radio stations, has joined the InfoStream Webcast ratings alliance of **Arbitron Internet**

Information Services, New York.

CARMA International, a Washington, D.C., media analysis firm, has extended its services to India through

a joint venture with **Media Research Services**, Bangalore, India.

Telmar Group, a New York supplier of media planning software, has formed an alliance with **Strata, Inc.**, a Chicago media-buying software firm, to offer an integrated supply of software systems for media planning and buying.

Chicago-based **Trans Union** has purchased a minority interest in Credi Cromer, which operates Costa Rica's largest credit information database.

Chamberlain Research Consultants has moved to new offices at 710 John Nolen Dr., Madison, Wis., 53713-1422. The new facility features three focus group suites, one-on-one interviewing rooms and a commercial kitchen. For more information call 608-246-3010.

Opinion Research Corp., Princeton, N.J., has introduced a new
continued on p. 68

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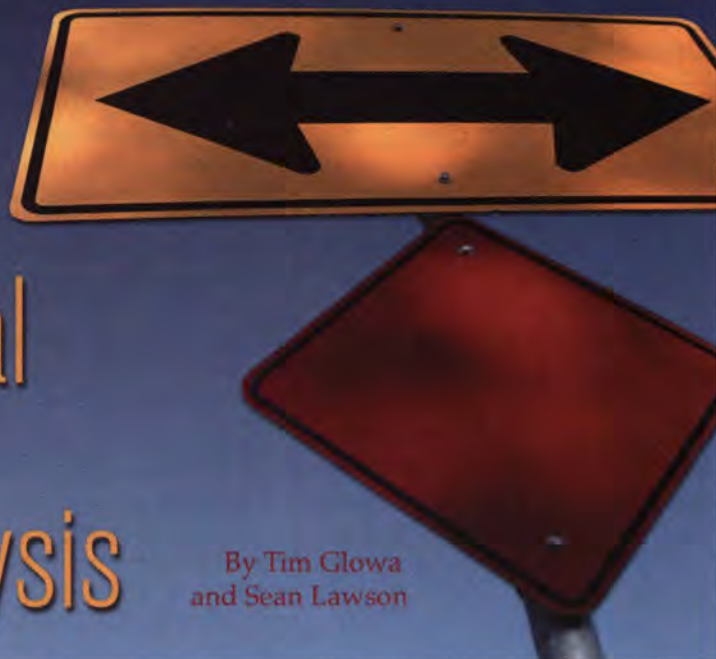
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Discrete choice experiments and traditional conjoint analysis



By Tim Glowa
and Sean Lawson

Editor's note: Tim Glowa and Sean Lawson are partners in North Country Research, Calgary, Alberta. They can be reached at 403-208-3953 or at tim.glowa@ncresearch.com or sean.lawson@ncresearch.com. This article is based on a presentation by Tim Glowa to the Sixth Annual International Air Transport Association Market Research Conference in Geneva, Switzerland on December 8, 1998.

Consumer behavioral models provide a quantitative measure of the relative importance of one attribute as opposed to another. The most direct method of determining this importance is simply to ask people what is most important. The problem is that most respondents will simply mention that everything is important. Researchers saw the need to infer the relative importance of various attributes.

A very popular tool for modeling consumer behavior, since its appearance around 1970, is conjoint analysis. This tool, despite its widespread popularity, should not be used because of several critical assumptions inherent in its design which lead to faulty predictions. Discrete choice modeling was created to combat the deficiencies associated with traditional conjoint.

After reviewing the history of choice experiments, this article compares choice models with traditional

conjoint analysis.

Where do choice experiments come from?

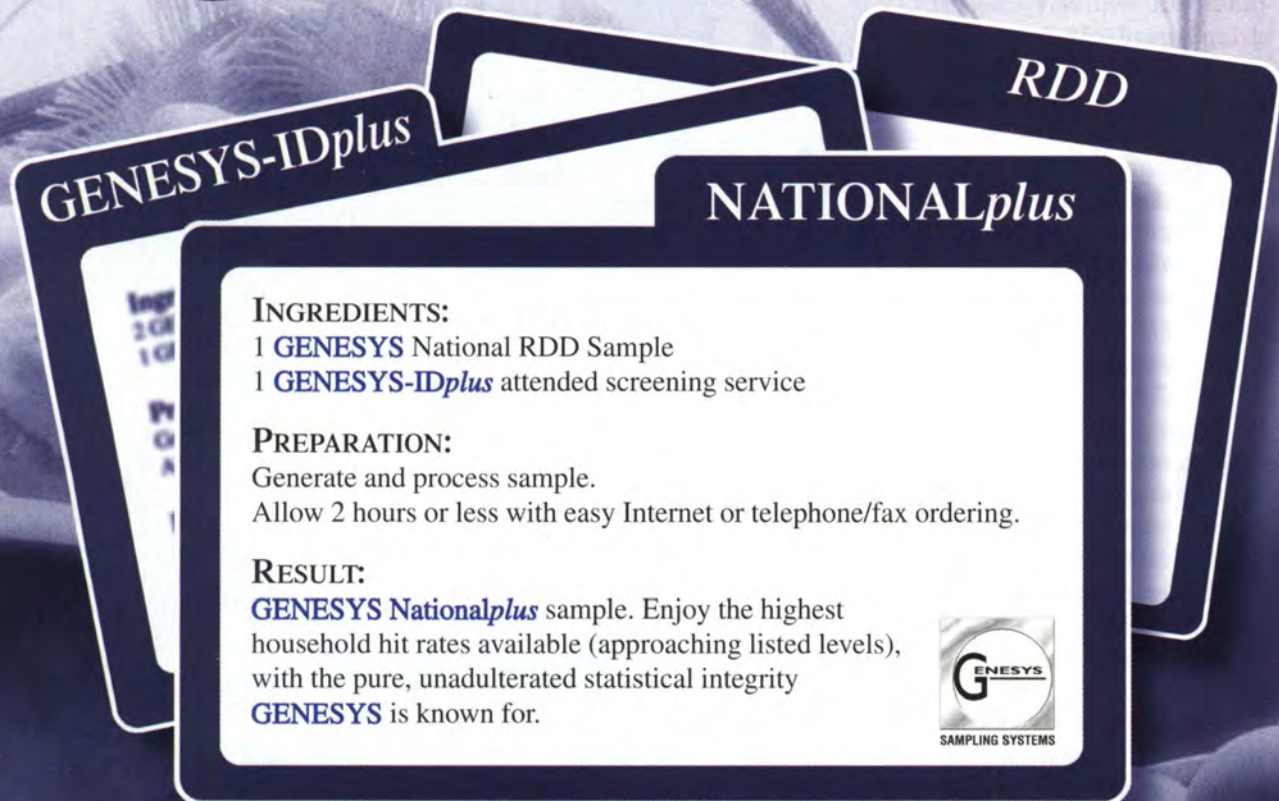
Choice experiments have a long and distinguished tradition, beginning with Louis L. Thurstone's 1927 paper in *Psychological Review* on paired (comparison) choice experiments. Present interest in choice experiments derives from three major breakthroughs in theory and methods, which have occurred since the mid-1970's:

1. Random utility theory (RUT) and multiple choice models.

Although Thurstone originally proposed what has come to be known as random utility theory (RUT), he was unable to extend it to the case of choices among more than two alternatives, such as three or more brands, vacation destinations, transport modes, etc. The key extension, which has led to the widespread adoption and application of multiple choice models, is attributable to Dan McFadden, who extended Thurstone's ideas in a seminal 1974 paper in "Frontiers in Econometrics," edited by Zarembka. In this and subsequent papers, McFadden and others extend the basic theoretical ideas and show how they can be applied to a plethora of practical problems. In marketing and strategic research, multiple choice models have been applied to a very

continued on p. 72

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Editor's note: Harry Vardis is president of Creative Focus, Inc., an Atlanta research firm. He can be reached at 404-256-7000 or at vardis@mindspring.com. Sandra Vasa-Sideris is an associate professor in the School of Management at Southern Polytechnic State University, Marietta, Ga. She can be reached at 770-528-3155 or at svasasid@spsu.edu. This article was first published in the Journal of Business & Industrial Marketing, Vol. 15, Nos. 2/3.

Creativity is essential to the development of positioning strategies. However, in order for these creative solutions to be implemented, the client must be willing to accept them. Built on a foundation of extensive research and practice in the field of creativity, the PISCESSM process (plan, imagine, select, create, evaluate, start) is a guided creative process that leads to successful positioning action plans. By design, the process is structured to engage the client from the beginning, thereby increasing buy-in of the creative solutions that are developed and putting clients in the driver's seat. The five-step PISCES process has been used to develop new advertising as well as to create new products, extend a product line, and to reposition an existing product. This article provides an overview of the steps in the process, including some of the creativity tools used and presents an example of successful application of the process.

Differentiate

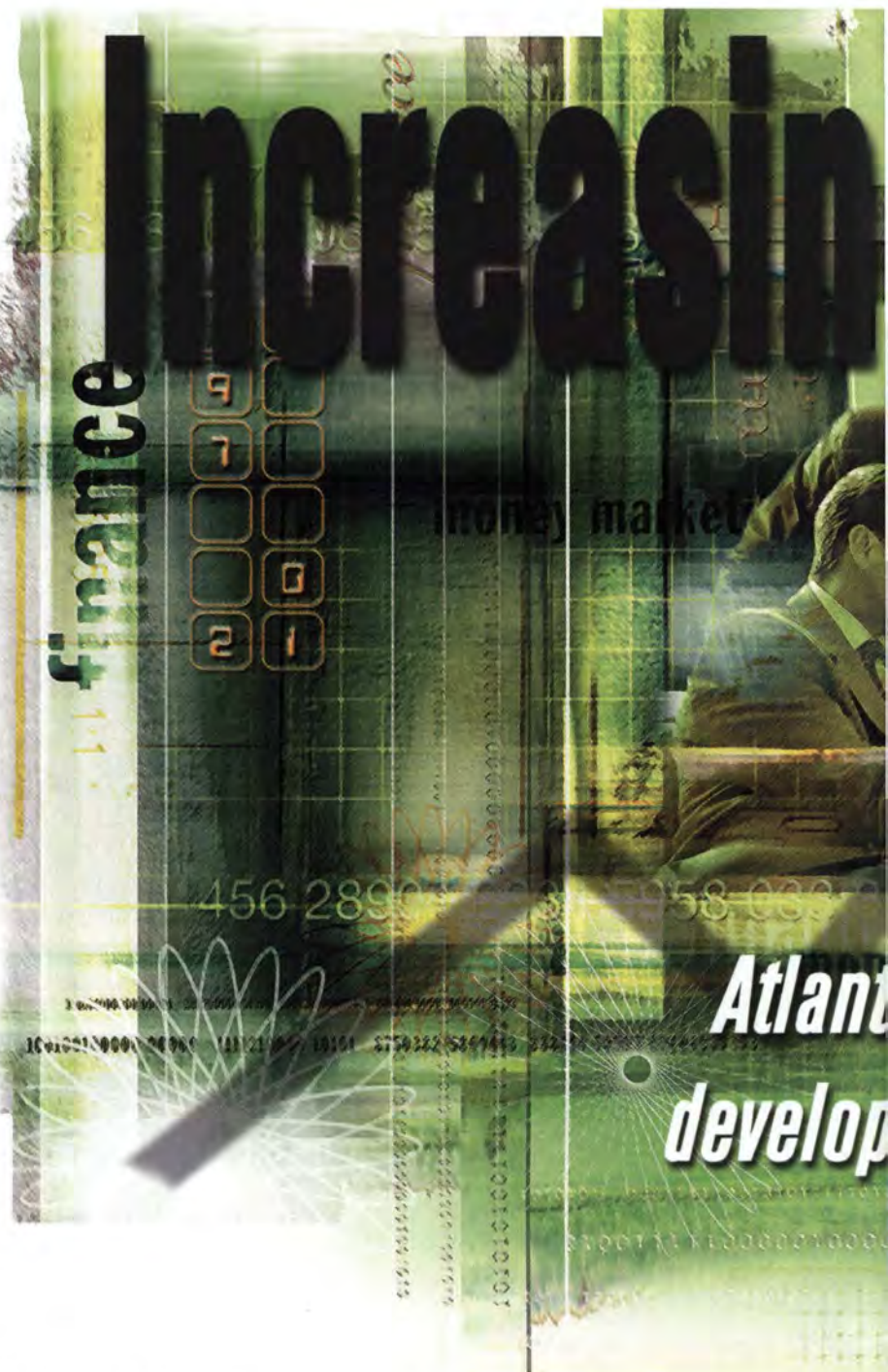
In our competitive society, companies recognize the need to differentiate their products and services from others. A differentiating strategy has

the following characteristics:

- credibility;
- durability;
- unique benefit;
- meaningful benefit (to the target group);
- executable in advertising or other public relations vehicles;
- relation to a feeling, a need, or a desire in the target's mind;
- consistency with the perception of

the product/service performance.

The process of developing the differentiation strategy is achieved in a variety of ways. Trout (1996) provides a number of examples of the contribution a consultant can make in generating new positioning statements. Schultz, Tannenbaum, and Lauderhorn (1994) provide guidance on the types of issues to be addressed. And, Aacker's (1996) model for brand iden-



interest

bank uses PISCES process to creative positioning strategies

By Harry Vardis and Sandra Vasa-Sideris

tity planning includes dimensions and beliefs to be addressed. However, the actual steps taken to achieve the strategy are not so clearly defined.

Experience in working with clients suggests that leadership for developing positioning may be taken by an internal marketing team in some companies, while in others, an external agency, consultant, or public relations firm takes the lead. The basis for gen-

erating the positioning may come from focus groups conducted to gain insight into customers' perceptions or from an in-depth analysis of the positioning of competitors to identify possible opportunities.

These approaches may involve multiple iterations of positioning statements and creative work due to having to go back and forth between the groups. This also may increase the

time from initiation of discussions on positioning to delivery of the creative campaign. AT&T found, in an internal study of its own positioning process, that it took approximately 11 months to go from concept generation to the point where creative work was completed. In an era where speed to market is critical, AT&T could not afford to have such a lengthy cycle time. Revisions to the process at AT&T resulted in a reduction in cycle time to about three-and-a-half months.

Planning is critical to having an effective and efficient process, so is the involvement of key people. Chrysler has reduced the time from concept development to manufacturing a car from four years to less than two by establishing cross-functional teams including representatives from design, finance, suppliers, and other groups to expedite the process.

At Chrysler, the CEO was instrumental in creating and leading the vision for change. This is true in creating a positioning strategy. Trout (1996) highlights the role of the CEO in the repositioning of Lotus as groupware. But in the Lotus example, the repositioning was developed first, then the CEO took an active role in promoting the new vision.

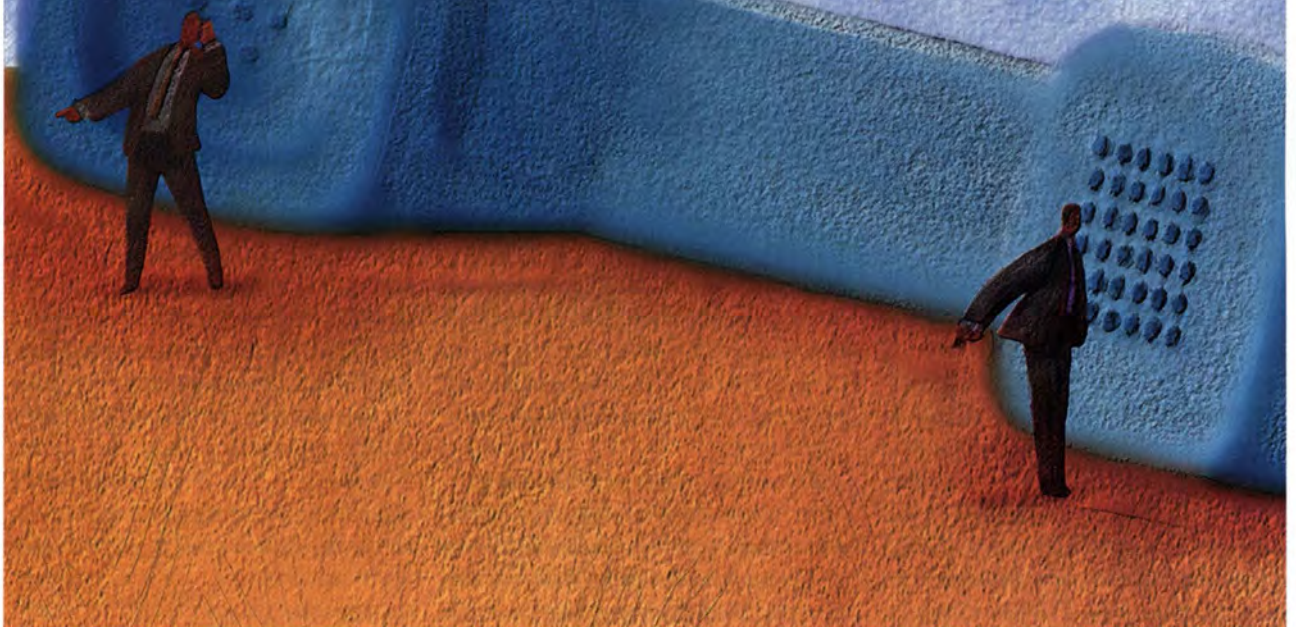
Based on extensive work in marketing research and creativity in problem solving (Isaksen and Treffinger, 1985; VanGundy, 1980), a facilitated creative process was developed which incorporates involvement of key players including the CEO, where appropriate, from the outset. The process has been found to be effective in achieving participant commitment, desired results, and efficient

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Cold-calling that sells research

*Follow these rules when
contacting prospects*

By Liza von Claparede



Editor's note: Liza von Claparede is president of LvC Company, a Saginaw, Mich., business development and sales training firm. She can be reached at 517-799-6921 or wvcn@prodigy.net.

Once I saw Jerry Seinfeld do a wonderful routine in which he mentioned a survey of the American public in which a majority of respondents (92 percent) admitted they were more afraid of public speaking than they were of death. He asked the audience to ponder this for a minute and then he observed, if the data is to be believed, it would appear that 92 percent of individuals attending any given funeral are going to be more comfortable in the coffin than they would be on the dais giving the eulogy!

I love that Seinfeld routine because it reminds me of the way most people react to cold-calling. Over the years, cold-calling has become the most berated of marketing tactics and the reason is clear: most people do it so badly that it is as painful to execute as it is to listen to. And this is a shame.

Before you opt for the comfort of the coffin (like the folks in Seinfeld's survey) consider this: In my final year working in corporate America — i.e., working for someone else — I generated nearly \$1 million in new business — just me and my telephone. No tricks, no games, no snake oil. The company that employed me was a small, full-service market research firm. Using my "rules" and some other skills I had perfected along the way, we achieved amazing revenue growth and client acquisition. This same firm, years earlier, had had serious doubts as to whether research could be sold at all using the telephone.

From my two decades of selling (both in and out of the research industry), I can tell you that cold-calling is the single most expedient, cost-effective way to generate new business. It is more immediate than advertising, more compelling than direct mail, and faster than networking. When done correct-

ly, cold-calling can yield astounding results, and it can do so without huge capital expenditures, cash outlays, or an increase in staff.

But market researchers are typically not good cold-callers. It's not because they don't know their product or their target audience. Nor do they lack enthusiasm and technical knowledge. It's because they haven't been trained to sell a product or service — and certainly not over the phone. Research is a serious business and researchers have come to doubt the respectability of a cold-call. Additionally, many firms are small to mid-size, with principals as owner-operators. When your name is on the door it becomes harder to separate yourself from the product. Picking up that phone is equivalent to putting yourself out there and many research professionals are not comfortable doing that.

To address this discomfort, and in an effort to make a case for cold-calling as an effective way to sell research (be it full or field services), I will share a few strategies which I think might be helpful to those firms who want to increase revenues by engaging in a sales program that embraces cold-calling. I call these strategies "The Rules of Engagement" and they have served me well.

Rule #1: Be clinical. Approach the cold-call effort with an emotional detachment. Business-to-business cold-calling is much different from consumer work and there aren't many professionals who hang up on you. Nevertheless, you will certainly reach people who are not at all interested in speaking with you, so a thick skin is a valuable resource!

Rule #2: Exude confidence. Any lack of confidence on your part will be construed as a lack of confidence in the

abilities of the company you represent. Simple clues like the timbre of your voice, the strength with which you speak, and the words you choose to use can communicate confidence to your prospect.

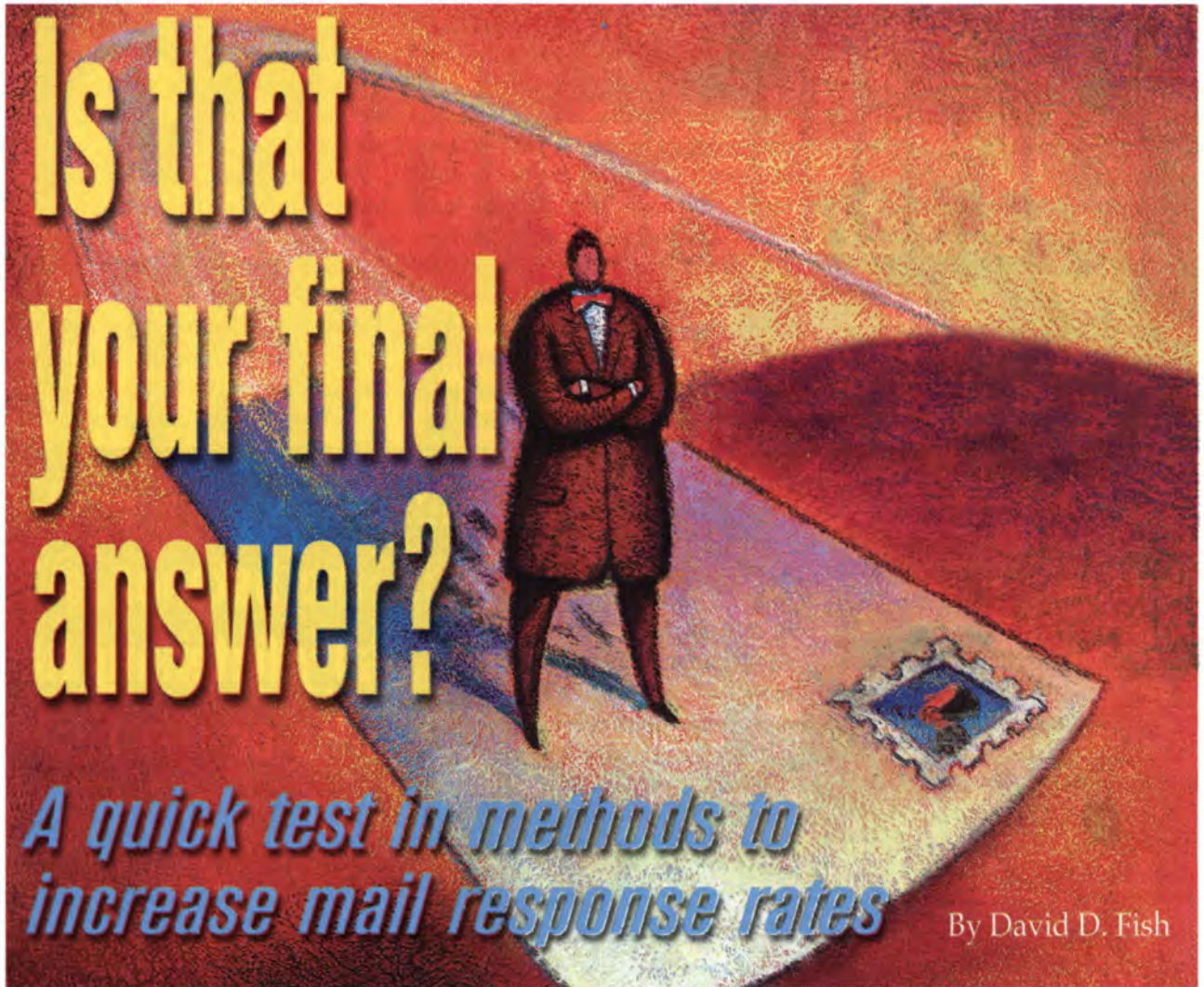
Rule #3: Find common ground. Many times in a cold-call, the listener is not really listening to you. He or she is actually trying to figure out how or where you got their name. Remove this distraction by telling them right up front. Maybe you got their name from an association directory or from a newspaper article. Tell them so imme-

Many times in a cold-call, the listener is not really listening to you. He or she is actually trying to figure out how or where you got their name. Remove this distraction by telling them right up front.

diately. It helps to break the ice because it shows that you are aware of, and involved in, things that affect and/or serve the industry.

Rule #4: Know your purpose. When you pick up the phone to call a prospect, know what you are going to say. As the individual who instigated the contact, you must set the direction of the call. You should be prepared to

continued on p. 76



Editor's note: David D. Fish is strategic research manager for Toyota Motor Sales USA, Inc., Torrance, Calif. He can be reached at 310-618-4213 or at david_fish@toyota.com.

Over the years there has been a fair amount of debate about how to increase response rates in consumer mail studies. This is only natural, since mail studies are increasingly expensive and boosting response rates just a few percentage points can mean saving thousands of dollars. This issue has become especially cogent recently, with the vast number of mail surveys competing for consumers' attention.

The short test below is based on experience and academic research on the topic. Below is a list of commonly held beliefs about response rate

improvement; some are fact, some fiction. While there are no absolutes in research, the preponderance of evidence seems to support the answers below. Test your skill in this short true/false test.

1) True or false: The use of color will increase response rates in mail studies.

False. Slapping some color onto an existing questionnaire will not increase response rate. Even a careful redesign that adds graphics and multiple colors tends to have a minimal impact. In fact, it may decrease your response rate. If your questionnaire is too glitzy it may be perceived as a direct mail piece and simply be tossed into the trash. However, that is not to say that your questionnaire should be sloppy or poorly designed. Questionnaires

should look professional and official, with clearly-worded questions that are easy to complete. The layout of the questionnaire should also be simple to follow, without a maze of skip patterns and a menagerie of arrows pointing to separate parts of the questionnaire. The best advice: keep it simple and clean.

2) True or false: Stamps on return envelopes will increase your response rate over pre-printed postage-paid envelopes.

False. Intuitively, you may think stamps on an envelope rather than a sterile postage-paid marking would increase your response rate. That has not been my experience nor has it been reported in the academic literature. Since postage-paid permits are typically cheaper and require less labor

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(no one has to lick all those stamps!) you might as well go with the pre-printed postal permit approach.

3) *True or false: The length of the questionnaire significantly effects response rates.*

True. This can have quite dramatic effects on response rates. However, the word "length" can be misleading. If you squeeze eight pages of content into four pages, you will get an equally dismal response rate. The optimal approach is to triage your most important questions for inclusion into your questionnaire, then front-load your questionnaire with the easiest questions first. Alternatively, design some kind of logical flow for the questionnaire. For example, in a buying-process questionnaire you would want the questionnaire sections to correspond with the buying process. The bottom line is, the shorter the survey, the better the response rate — so choose your questions wisely.

4) *True or false: A recognizable name brand will increase response rates.*

You bet. The more well-known the brand name (e.g., Toyota), the more likely it will help response rates. However, the need for sponsorship anonymity may preclude this option. For example, if you are trying to get an honest evaluation of your product versus other products it would not be a good idea to include your company's name on the cover letter.

However, if it is a quality survey for a product purchased from your company, the survey provides the added benefit of generating customer goodwill. A follow-up satisfaction survey on product purchase conveys to customers that the company really cares about their satisfaction, which may increase post-purchase satisfaction and possibly repeat sales.

5) *True or false: Incentives to increase response rate are cost-effective.*

Not usually. While incentives certainly work to get your response rates up, they are sometimes not as effective as simply buying additional names. However, that approach also

has its drawbacks in the form of increasing the menace of non-response bias in your sample. Incentives are good to use in general, but particularly for hard-to-reach populations (e.g., vegetarian truck drivers). However, sometimes for the cost involved, incentives just do not make financial sense.

6) *True or false: Greenbacks work better than non-monetary incentives.*

Everyone loves money; survey respondents are no exception. In general, cash is the best way to get people to fill out surveys. While other methods (phone cards, lottery, etc.) also provide a bump in response rate, cash still seems to do the best job in increasing response rates. However, other approaches, such as giving away merchandise with your company logo, can provide the added marketing benefit of getting some exposure for your company. Again, you might want to consider this in a customer satisfaction setting.


7) *True or false: "Pre-notification" postcards increase response rates.*

There is limited evidence that the pre-notification post card increases response rates. When post cards have been shown to work, the effect is generally minimal. This modest response rate bump may not worth the money.

8) *True or false: "Reminder" postcards increase response rates.*

Reminder cards appear to have a slight impact on increasing response rates. However, you may want to weigh the cost of sending them out. If it is a hard-to-reach sample, or you are especially concerned about non-response bias, I would recommend this approach as good way to create a modest increase in your response rate for a nominal cost.

Serious business

Well, how did you score? Raising response rates is serious business and trial-and-error of techniques can be expensive. Using the points above as guidance will allow you to use your market research dollars more effectively. 

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Working with the Kano method

Technique helps focus the product development process

By Karen P. Gonçalves and Michelle Gonçalves

Editor's note: Karen P. Gonçalves is president, and Michelle Gonçalves is consultant, at Delphi Market Research, Medford, Mass. They can be reached at 781-393-6600.

We have all heard about the Kano method, and how it can supposedly allow researchers to quickly and inexpensively break down preferences about a certain product or service and thus:

- accurately focus the direction of development;
- lower product and service development costs;
- shorten time to market and;
- increase the probability that new or refined offerings will be successful.

Clearly, these are very big claims, so it is worthwhile to explore if and how you might use this method.

The Kano method, developed by Dr. Noriaki Kano of Tokyo Riko University less than 10 years ago, is related to conjoint analysis, in that comparisons, rather than discrete answers, are an important part of the interpretation. But unlike conjoint analysis, the respondent is not asked to make trade-offs or choices among options. Rather, respondents independently rate their pleasure or displeasure with the way in which up to two dozen variables are delivered to them. The pleasure/displeasure answers allow researchers to classify each variable as attractive, one-dimensional, must-be, or indifferent. These categories are defined as follows:

- An "attractive" attribute is simply that — attractive. There is no penalty for not including an attractive element, but including it makes the product or service better to use, differentiates it from competing offerings, and will "delight" the user. An example of this might be high-end speakers for a computer. They can add greatly to the enjoyment of the offering (one can now listen to high-quality



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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.

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Monica
Stan
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ity music while working), but very few people would not buy a certain computer because it did not include high-end speakers. They are an attractive extra, marketed as an element that differentiates your computer from competing models.

- A "one-dimensional" characteristic is one where more is always better. A lower degree of functionality in a one-dimensional characteristic will displease customers, and a higher degree of functionality will please them. An example of this might be processor speed in a computer. We all want faster computers, and we have yet to find a consumer who decides that a computer is just too fast. Furthermore, a slower computer will always be perceived as less pleasing.

- A "must-be" characteristic is one the customer considers essential. It is much closer to a binary rather than a one-dimensional characteristic. Without it, a consumer will not buy — you are not a serious contender in an industry unless your offering provides all of the must-be characteristics. Continuing with the computer example, a CD-ROM drive (once an attractive characteristic) has become a must-be for most consumers. Without it, the computer would be vastly less functional, and with it, the computer is functional. Furthermore, there is only a small percentage of users for whom a faster CD-ROM is important.

- An "indifferent" attribute is one that consumers do not value. It is important to note that each segment of your market may be indifferent about different characteristics. While this may not be the case for a product or service with a very narrowly defined use, a general use product or service may show a large degree of variation in the "indifferent" category. While most people use a computer, there are different types of users, all of whom have different needs. A graphic designer may consider a large, high-resolution monitor essential (a must-be); a writer might be indifferent toward monitor size and resolution.

Once each variable is categorized as attractive, one-dimensional, must-be or indifferent, researchers use the rest of the survey instrument to further

break down and understand consumer needs and preferences.

Creating a Kano method survey

There are typically four components to a Kano method survey. The first is the Kano questions themselves, which consist of a series of up to two dozen paired-comparison questions, each of which is answered using an ordinal, five-point scale. It is important to note that the five-point scale is not an interval scale, which affects the analysis. There has been a fair amount of experimentation surrounding the exact wording of the five-point scale, and our company's clients have each handled the scale differently. Typically, we work with them, either during the pre-test, or over time (when they are conducting a series of Kano method surveys), to determine the exact wording that their target markets will understand and respond to objectively. The Center for Quality of Management (CQM), Cambridge, Mass., was the first organization to publish extensively on the Kano method and their work is very helpful in deciding if Dr. Kano's exact wording or if a variation on his words is best.

It can be difficult to get the wording of the paired-comparison questions exactly as you want them, but there are ways to help ensure that the questions are both thought-provoking and helpful to decision making. Most firms using Kano method surveys include it as a second or later part of a multi-step new product development process. This also helps to ensure that the questions are meaningful, because they are designed using newly collected data directly from a select group of customers and/or prospects. The most important goal in designing these pairs of questions is to ensure that one half of the pair is "functional" and the other half is "dysfunctional" — in other words, that respondents see one as a positive product or service characteristic, and the other as either negative or less positive than the first half.

The second part of the survey is the self-stated importance (SSI) component. In this section, consumers state

how important or unimportant various product or service characteristics are to them. This more direct questioning allows researchers to glean significant insights into the nuances of consumer opinion. One can determine the degree of importance, the strength of opinion, and the unity of opinion among respondents. Once these are established, one can rank variables within each of the four categories — an important detail when as many as two dozen variables are being studied.

The next portion of a typical Kano survey is the utility section. Sometimes referred to as functionality or parametrics, these questions address how respondents use the product. While client companies may assume they know how a product is being used, there are sometimes surprises. For example, one of our clients believed that customers in its three vehicle markets used a certain component in the same way in all three types of vehicles — that component size and expected life were the only differences that might affect product design. Through a Kano method survey to all three of these markets, this client learned about several other key differences that have allowed it to refine its component design, and to gain market share in two of these three markets. Especially when an offering is complex, the utility section of the questionnaire can be invaluable.

Often, respondents can be logically grouped into different market segments, each of which uses or values the product differently. These subgroups, which are based solely on product utility, can provide important information to researchers. As mentioned earlier, each functional subgroup may have entirely different needs or usage patterns than the next. A variable which for one group is a must-be could be attractive for another. This type of specific information is crucial in focusing product development, knowing what messages to include in sales and marketing materials, and in selecting appropriate target markets.

The last part of a well-designed Kano questionnaire asks demographic questions, which are used to deter-



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mine who makes up each subgroup as well as who the customers are. Unlike the utility section, which focuses on product use, the demographic section focuses on who the users are, who the decision-makers are, where they fit within the corporation (for business-to-business surveys), and how they evaluate each variable included in the survey.

When the entire questionnaire is analyzed, Kano offers a remarkably complete picture of the market's

needs, usage patterns and preferences. It also highlights which segments have different or unique needs, and how important those needs are in their purchase decisions. This analysis can help determine which characteristics of the offering need to be enhanced or completely changed, and which ones should remain the same. It can also highlight which aspects of an offering the customer simply does not care about, thus, offering opportunities to simplify or streamline the offering.

Finally, Kano method surveys can be very helpful in delineating and characterizing key market segments, each of which may be targeted in a different way, to respond to their specific needs, usage patterns and preferences.

Applying the Kano Method

Kano is always administered in a visual format. The respondent must be able to see all of the paired comparisons, and to see how they relate to the self-stated importance questions. In fact, respondents often go back and forth between different sections, and it is not unusual for them to write notes in the margins (or in designated spaces for on-line surveys), to enhance their answers to different parts of the questionnaire. Therefore, telephone or in-person interviews are not appropriate. Kano works best as either an on-line survey, or a traditional mail survey. It can also be self-administered individually or in a group setting, as long as the respondent can go back and forth among the sections as often as he or she wants. This can be an important advantage for resource-constrained clients, because mail and on-line surveys tend to be much less expensive to administer than telephone surveys, they take only slightly longer in total elapsed time, and it is possible to achieve higher overall response rates with mail or on-line surveys than with telephone surveys.

Mail surveys bring with them any number of difficulties which must be addressed. Often the largest problem is acquiring an accurate, appropriate list. However, since customers are typically included among recipients of the survey, the client can generally provide, generate or purchase a reasonable list. Acquiring a good list of prospects is also crucial. Find a good list source and keep them close by. Once the prospect and customer lists have been checked for duplicates, errors and accuracy, you're ready to send.

Attaining a high response rate with a mail survey is not as difficult as one might assume. Although telephone surveys are traditionally associated with a higher response rate than mail



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surveys, that has changed in recent years. Within our firm, business-to-business mail surveys typically yield response rates of about 20 percent and consumer mail surveys yield response rates of about 40 percent. Our president has conducted considerable research, both within academia and with commercial clients, on how to increase response rates to mail surveys. She has tested various combinations of outbound survey content, a range of incentives, and questionnaire length, content and format. Her dissertation included a mail survey which yielded a 75 percent response rate. Within the commercial sector, using what she and the rest of the staff have learned, our firm has attained business-to-business response rates up to 43 percent and consumer response rates up to 60 percent for traditional mail surveys.

Analysis

Occasionally, during analysis, two additional Kano categories emerge: "questionable" and "reversal." Questionable variables are those for which the respondent has given answers which are not internally consistent. For example, they are extremely satisfied with both the functional and dysfunctional halves of a paired-comparison question. This typically means that the question was confusing to respondents, or that there was simply not enough difference in their attitude toward both halves of the question to generate two different responses. Sometimes, further analysis clarifies these responses; other times these questions need to be discarded.

A variable is classified as a reversal if it is rated most highly when dysfunctional. This implies either a failure of respondents to understand the question, or an incorrect assumption by the client regarding product utility.

Most well-designed Kano method questionnaires do not include reversals or questionable variables, but they occur occasionally. Both can be helpful in convincing clients to reconsider pre-conceived notions about a market, or in learning new

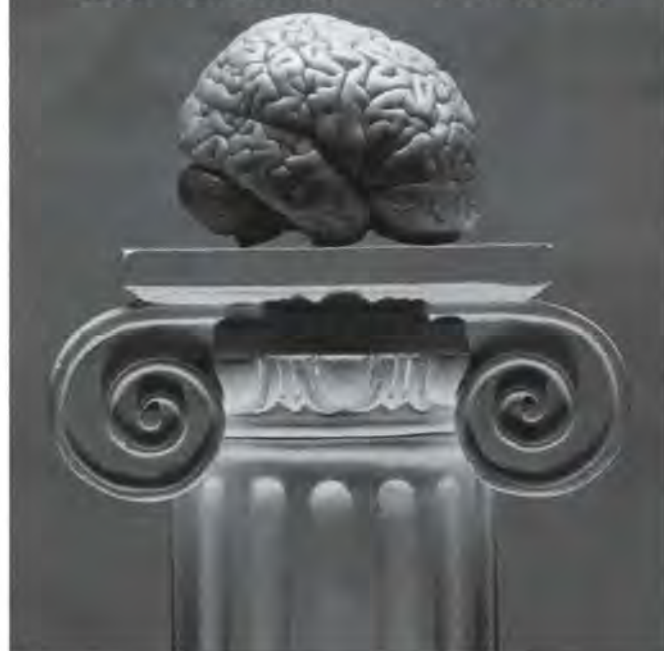
things about a market that no one knew before the survey was conducted.

Conclusions

Clients tell us that Kano method surveys are extremely helpful in focusing the rest of the product development process. It can be instrumental in arguing against further expenditures on characteristics or attributes that customers simply do not care about; it can also pro-

vide an early warning system when attitudes or needs are shifting, or when what used to be "attractive" attributes are becoming "must-be" or "one dimensional." Perhaps most important, the results of a Kano method survey are often very revealing regarding product uses or applications that the client did not know about, and in dividing the overall market into manageable, discrete segments that can be targeted separately. **EQ**

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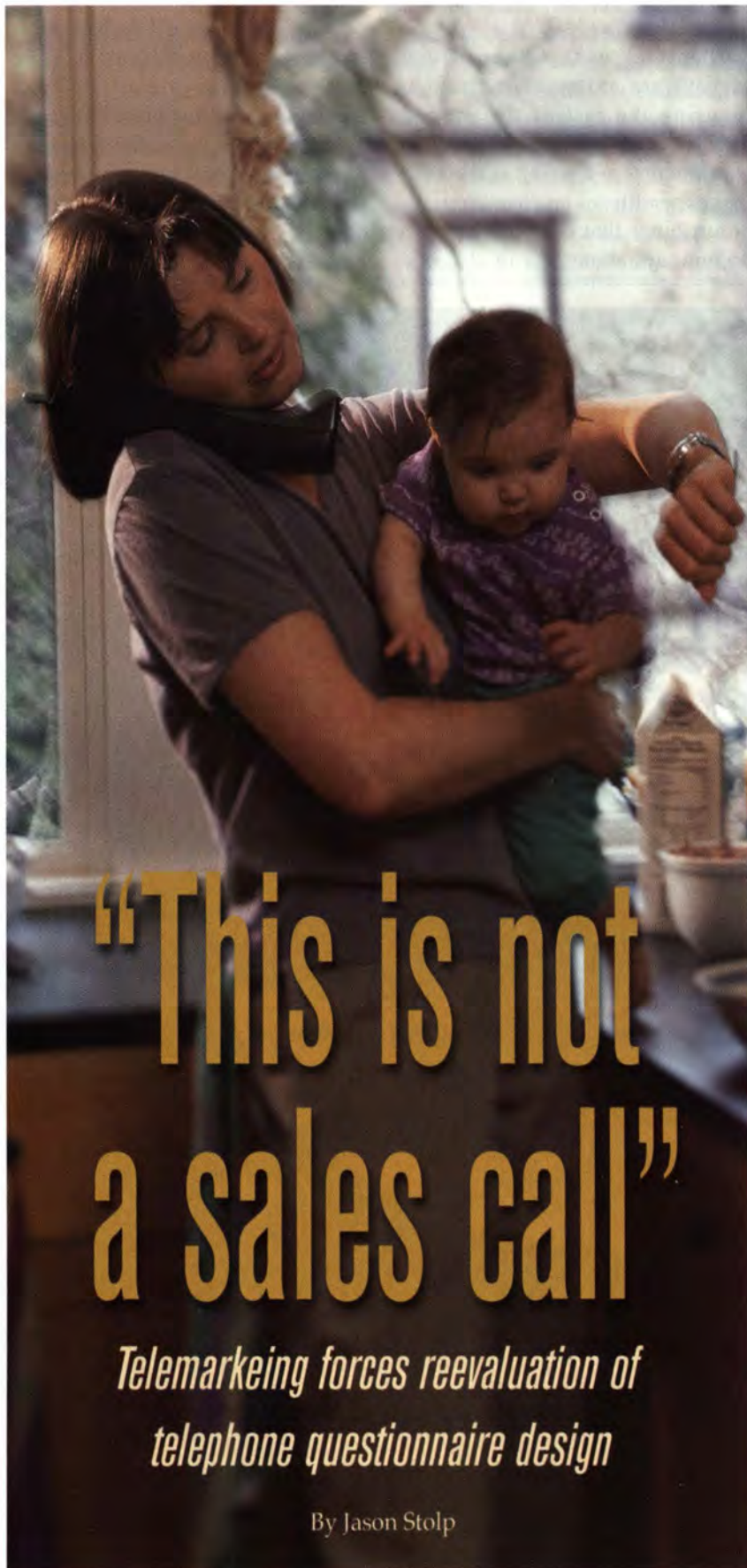
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"This is not a sales call"

Telemarketing forces reevaluation of telephone questionnaire design

By Jason Stolp

Editor's note: Jason Stolp is project associate at Q & A Research, Inc., Novato, Calif. He can be reached at 415-883-1188.

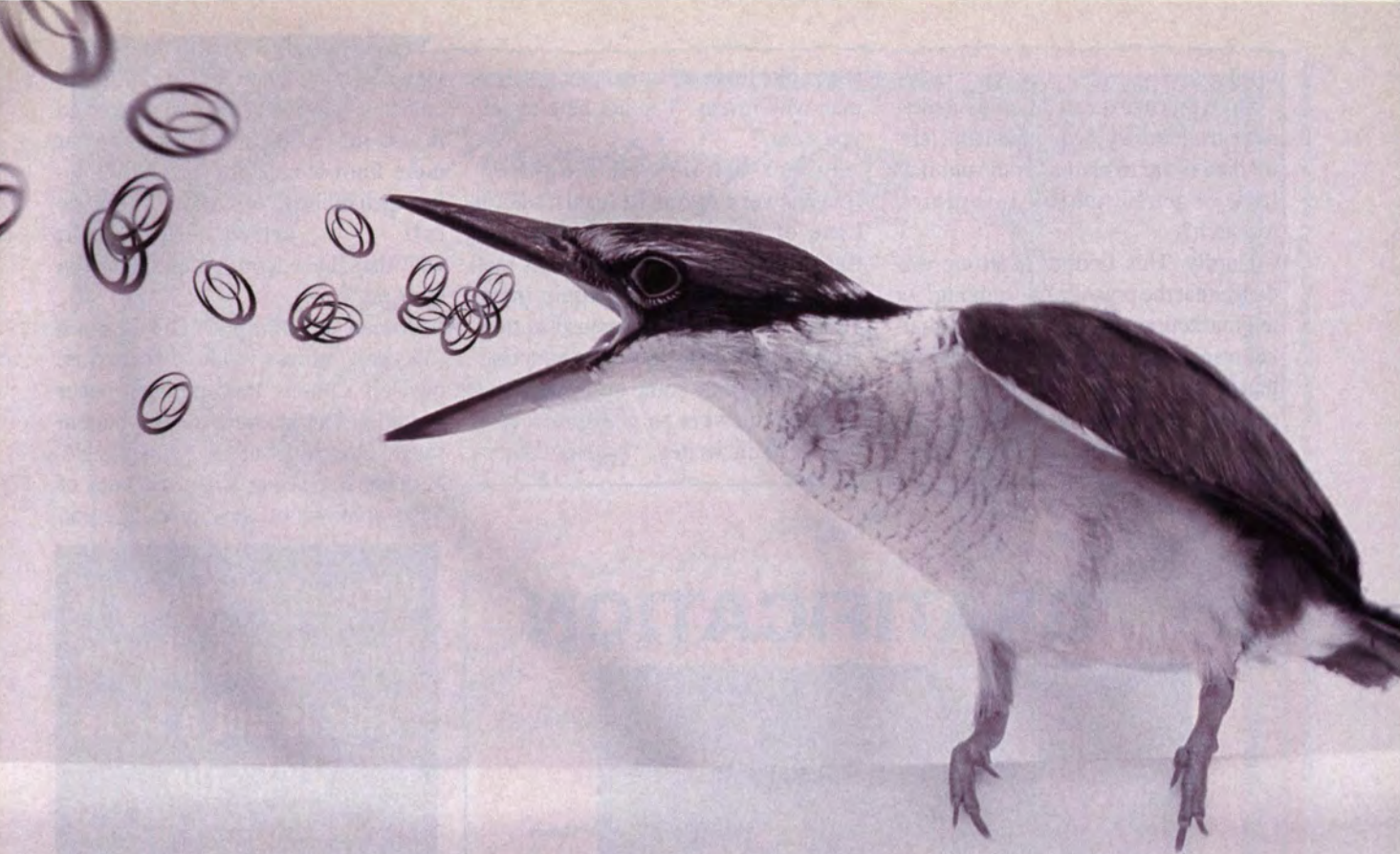
When designing a questionnaire, too often the introduction is merely an afterthought. As market researchers, we are naturally more interested in the meat of the matter, the actual questions that will directly address the study's objective. However, regardless of how insightful and well-designed the body of the questionnaire is, an ill-conceived introduction may mean that high refusal rates will cause dialing costs to skyrocket, making the research unviable.

Meanwhile, the market research community is growing acutely aware of faltering cooperation rates and blames the telemarketing industry for using deceptive tactics that unfairly bias the public against legitimate opinion research.

In an effort to combat this trend, The Council for Marketing and Opinion Research (CMOR) undertook a study to evaluate, among other things, the effect of common questionnaire introduction components on cooperation rates. (Source: *Opinion: The Newsletter Magazine of CMOR*, V1, No.1, Winter 1998)

For the most part, any seasoned researcher could have anticipated the results. Disclosing the interview length up front — "This will only take five minutes" — served to increase cooperation, as did identifying the client and the subject matter.

The surprise came when refusal rates of interviews in which the introduction verbiage contained phrases like "This is not a sales call" were compared to questionnaires where no mention of sales was made at all. Far from increasing cooperation rates, these assurances actually increased the number of refusals (51 percent not a sales call; 43 percent "no sales" men-



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tion).

Does this unexpected finding undermine the industry's complaint that telemarketers are to blame for the public's lack of participation in opinion research?

Hardly. This finding is strong evidence that the practice of "sugging," or telemarketing under the guise of market research, has become so pervasive that no matter how candid legitimate researchers are about the purpose of their calls, the public hears these assur-

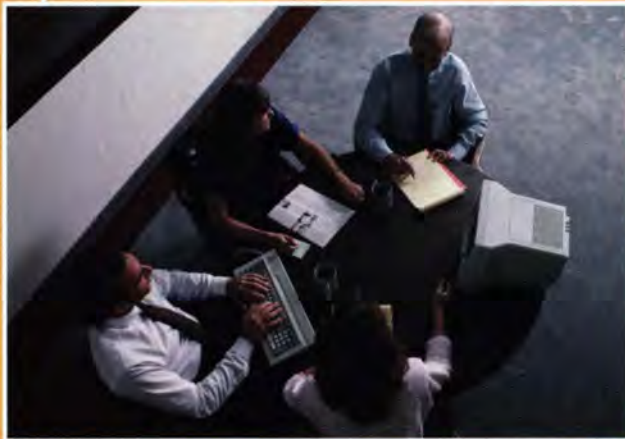
ances like those of the used-car salesman who insists "I'm not here to sell you a car."

In her article "Helping New Interviewers Avoid Refusals," Nina Liou of the University of North Carolina at Chapel Hill suggests that the better approach is to equip interviewers with a stock response so they are prepared to address these concerns if and when they come up. "Providing scripted answers to common questions," Liou writes, "bolsters inter-

viewers' confidence in their ability to convince respondents to participate and it also makes the interviewer appear more knowledgeable, thereby reducing the likelihood of a refusal." (For the full article visit www.irss.unc.edu/nnsf/newsletters/nnsf27.pdf)

Instead of putting a "This is not a sales call" phrase in the introduction, develop a phrase that the interviewer can turn to in the event the respondent says, "OK, so what are you selling?" Perhaps something along the lines of "The opinions of consumers like you

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Without resorting to the dubious phrase "This is not a sales call," the interviewer has effectively defused the situation while at the same time appealing to the average person's desire to have their opinions count.

provide invaluable feedback to Company X in their efforts to continually better the products and services they provide. Do you have a few minutes to help us with your thoughts?" Without resorting to the dubious phrase "This is not a sales call," the interviewer has effectively defused the situation while at the same time appealing to the average person's desire to have their opinions count.

Writing introductions that utilize these elements and taking the time to train interviewers with these strategies will make your research a more rewarding experience for respondent and client alike. ☞

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Editor's note: Robert Weissbourd is executive vice president of Shorebank Chicago Companies. Shelly Herman is managing director of Shorebank Advisory Services. Christopher Berry is a senior consultant to Shorebank on modeling, data analysis and research related to inner city business markets. Shorebank Corporation is a Chicago-based community development bank.

Businesses of all sizes searching for new markets are finding the most lucrative opportunities in their own backyards. America's inner cities offer dramatically underserved markets with an immediate and vast potential for growth. For example, Chicago's South Shore neighborhood — still frequently stereotyped as a place populated by the poor, unemployed and disinvested — has nearly twice the buying power of

Kenilworth, one of the city's wealthiest suburbs. As a result of high population density, South Shore also has more households with incomes greater than \$50,000 than its affluent suburban counterpart.

Nationally, over one-third of all consumer expenditures are made by individuals with reported annual incomes of under \$30,000 — a staggering \$920 billion of purchases a year. Despite these demographics, demand continues to outstrip supply in almost every retail and service sector in the urban market. Residents in neighborhoods like South Shore are forced to travel outside their communities to meet even their most basic retail and service needs. This phenomenon of expenditure leakage is nearly twice as high in South Shore as the average Chicago community.

How can the market opportunity be so great, yet go virtually unseen?

What defines economies and moves markets is information: market intelligence on who the best customers are, what they want, where to find them, and how best to reach them. In our Information Age-economy, market intelligence is the single most valuable commodity to business. Yet, the traditional market data needed to identify business opportunities in inner city neighborhoods is frequently unavailable or unreliable. This lack of essential market information has prevented most businesses from identifying and investing in the significant opportunities in the inner city.

Some corporations, such as Bank of America, State Farm Insurance, Del-Ray Farms, and Walgreen's, have ventured into the inner city — often in spite of their data and models indicating little potential — and have found rapidly growing markets and high returns. These success stories,

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I. DEMAND

FACTOR	KEY INDICATORS (e.g.)	DATA SOURCES (e.g.)
DEMAND	Population	
	• Number of Persons, Households, Families	• 1990 Census Data
	• Density	• Data Vendor Estimates
	➤ Daytime/Workplace Population	➤ Claritas Special Census Tabs
	➤ Population Undercounted by Census	➤ Daytime Business Population
		➤ Census Estimates of Undercounted Population
	Consumer Spending Power	
	• Total Expenditures	• CEX, Data Vendor Estimates
	• Expenditures by Category	➤ Original Local Area Expenditure Survey
	➤ Concentrated Buying Power	
Income		
• Average/Median Income	• 1990 Census data	
• Aggregate Income	• Data Vendor Estimates	
• Discretionary Income	➤ Tax Records	
➤ Income Distribution	➤ Bank Records	
➤ Non-cash Income	➤ Public Assistance Data	
Wealth/Assets		
• Home Ownership Rates	• 1990 Census Data	
• Home Values	• Tax Assessor Records	
➤ Savings/Investments	➤ Bank data (FRB)	
➤ Use of Credit	➤ Credit Agencies	
Creditworthiness		
➤ Bill Payment History	➤ Utilities Data	
➤ Credit Ratings	➤ Credit Agencies	
➤ Tax Delinquencies	➤ State Filings	
Unrecorded Economy (as Unrecognized Buying Power)		
➤ Unrecorded Income	➤ CEX National Estimates	
➤ Currency Circulation	➤ Original Survey Research	
	➤ Local Bank Data	
Float (Expenditure Leakage)		
➤ Dollars Spent Outside Area	➤ Sales Tax Data	
➤ Average Distance to Shop	➤ Chicago Area Transportation Studies (CATS)	

- Traditional indicators and data sources of market and site selection
- Criteria, data sources Shorebank The Business of Neighborhood Markets Framework

combined with new data confirming unexpectedly strong economic activity, have led to a growing recognition of untapped markets in the inner city. However, companies still need practical, operational tools in market and site selection to move from recognizing broad market potential in urban neighborhoods to identifying a particular site, product mix and marketing opportunities.

Data unavailable

Specialized business data and models on inner city market potential have been unavailable in the past. Conventional business data sources — ranging from census income data to private vendor household databases — grossly underestimate inner city market potential, or often do not even exist for inner city markets. In an effort to close this “inner city infor-

mation gap,” Chicago-based Shorebank Corporation created The Business of Neighborhood Markets Initiative. The Initiative is working with corporations, private data vendors and market research firms to create new market intelligence, specialized tools and operating partnerships for profitable inner city investment.

Shorebank, a community development bank, has been profitably investing in inner city markets for more than 25 years. The Initiative builds upon the institution’s experience to create new capacity for businesses to similarly identify and invest in undervalued markets. Shorebank currently works with companies doing business in the inner city and is looking for more corporations to partner with in the Initiative. An important initial product of the Initiative is The

II. BUSINESS CLIMATE

FACTOR	KEY INDICATORS (e.g.)	DATA SOURCES (e.g.)
BUSINESS CLIMATE	Competition (Direct, Indirect) <ul style="list-style-type: none"> • Number, Type, Location • Product/Service Line • Market Saturation 	<ul style="list-style-type: none"> • Yellow Pages, Economic Census, Claritas, D&B ➢ Tax Records, SBA Records
	Synergy (Complimentary Businesses) <ul style="list-style-type: none"> • Number, Type, Location • Product/Service Line • Performance (Sales, etc.) 	<ul style="list-style-type: none"> • Yellow Pages, Economic Census, Claritas, D&B ➢ Tax Records, SBA Records ➢ Private Company Data
	Total Economic Activity <ul style="list-style-type: none"> • Number, Type, Performance ➢ Business Tax Revenues ➢ Utility Usage 	<ul style="list-style-type: none"> • Yellow Pages, Economic Census, Claritas, D&B ➢ Tax Records, Permits ➢ Private Company, Utility Data
	Unrecorded Economy (as Unrecognized Competition) <ul style="list-style-type: none"> • Self Employment ➢ Cash Business Operations 	<ul style="list-style-type: none"> • 1990 Census Data ➢ FED, Local Bank, Checking Cashing, Circulation, etc.
	Market Gravity <ul style="list-style-type: none"> • Existing Commercial Centers • Market Anchors • Major Institutions 	<ul style="list-style-type: none"> • Maps, Directories, etc. ➢ Shopping Center Industry/ Developer Data

- Traditional indicators and data sources of market and site selection
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Neighborhood Markets Framework.

In creating the Framework, Shorebank identifies the types of data that companies need to select inner city markets, pinpointing existing,

potential and alternative sources of information. Using current models and working with business and market analysts, the Framework extrapolates the key factors businesses use in

III. NICHE MARKETS

FACTOR	KEY INDICATORS (e.g.)	DATA SOURCES (e.g.)
NICHE MARKETS	Basic Demographics <ul style="list-style-type: none"> • Race, Ethnicity • Family Size, Length of Residence • Age, Education • Income, Occupation 	<ul style="list-style-type: none"> • 1990 Census data, Data Vendor Estimates ➢ Estimates from City Demographer, Original Surveys ➢ Income Tax Records
	Market Segments <ul style="list-style-type: none"> • Lifestyle Characteristics • Psychographics • Hobbies/Interests • Segmentation Systems • Customer Profiles (existing businesses) 	<ul style="list-style-type: none"> • Donnelly, Claritas and Other Household-level Surveys • Proprietary Customer Surveys ➢ Original Survey Research ➢ Data on Microsegmentation ➢ Proprietary Company Data
	Distinctive Consumer Behavior/Preferences <ul style="list-style-type: none"> • Usage Patterns • Brand Awareness, Preferences • Status Consumption • Price, Quality, Service Preferences ➢ Ethnic Product Consumption 	<ul style="list-style-type: none"> • Donnelly, Simmons, MRI, Claritas, others • Internal Sales/Company Studies • Data Vendor Household Survey ➢ Proprietary Company Sales Data ➢ Analyze Inner City Residents Specifically

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making market decisions and identifies the conventional data related to each factor. It creates a vehicle for examining how these factors and data sets translate to the inner city and, where they do not, exploring alternatives. Utilizing the Framework, Shorebank and its partners are building an Inner City Economic Database, a comprehensive market-driven database for inner city markets. In its creation, Shorebank serves as a resource to businesses by providing market intelligence.

The Framework is continually expanding and being refined as new companies and experts become involved in the Initiative. The database similarly grows in scope and utility as additional businesses share their market data and resources with Shorebank. To date, corporations in the banking, insurance, and varied commercial and retail industries (including food, clothing and home repair), as well as market research firms (such as Claritas, The National Opinion Research Center [NORC] and Burrell Communication), are contributing and accessing data, expertise and experience tailored to doing business in the inner city. Shorebank works with individual companies on a strictly confidential basis, with no sharing of private information across companies.

Key factors

The Framework identifies six key factors that businesses traditionally use to examine and select markets.

IV. MARKET TRENDS: STABILITY, CONFIDENCE, MOMENTUM

FACTOR	KEY INDICATORS (e.g.)	DATA SOURCES (e.g.)
MARKET TRENDS: STABILITY, CONFIDENCE, MOMENTUM	Residential	
	<ul style="list-style-type: none"> • Population Growth/Decline • Turnover Rates/Home Tenure • Home Values ➢ Housing Rehab Activity ➢ Equity Growth ➢ Tax Delinquencies, Bankruptcies 	<ul style="list-style-type: none"> • 1990 Census Data • Private Company Estimates ➢ City Demographer Estimates ➢ Utility Hook-ups, Disconnects ➢ Tax Assessor/Income Tax data ➢ Bank, Insurance Company Data
	Businesses	
	<ul style="list-style-type: none"> • Commercial Construction • Vacancy/Abandonment Rates ➢ New Business Starts ➢ Business Failures, Closures ➢ Business Tax Delinquencies ➢ Property Conditions 	<ul style="list-style-type: none"> • 1990 Census Data • Anecdotal, Drive Around ➢ City Permits, Licenses ➢ Tax Records, State/City Filings ➢ Assessor Records ➢ Bank Records
	Financial Services Activity (as Confidence Indicator)	
<ul style="list-style-type: none"> ➢ Residential Lending ➢ Refinancing/Rehabilitation ➢ Business Lending ➢ Banking and Checking Cashing ➢ Insurance 	<ul style="list-style-type: none"> ➢ Private Banking Data ➢ Claritas Financial CLOUT survey ➢ Yellow Pages, D&B, Private Company Data 	
Social Capital		
<ul style="list-style-type: none"> ➢ Community Organizations ➢ Churches ➢ Business Associations ➢ Voter Registration, Turnout 	<ul style="list-style-type: none"> ➢ City Records ➢ Directories ➢ City/County/State Records 	
Quality of Life		
<ul style="list-style-type: none"> ➢ Neighborhood Outlook ➢ Consumer Confidence ➢ Health and health trends 	<ul style="list-style-type: none"> ➢ Mortality Rates ➢ Hospital Data 	

- Traditional Indicators and data sources of market and site selection
- Criteria, data sources Shorebank The Business of Neighborhood Markets Framework

The first of these is the demand for products based on demographic and expenditure data estimating the aggregate size of the market. The second is business climate, revealing competition, retail synergies, and general information on the economic health and potential of an area. The third factor examines demand for a

business's specific products, identifying market niches. Fourth are findings on market trends, ranging from residential to business to social trends in the neighborhood. The final two factors are operating costs, the cost of doing business in a particular neighborhood, and trade area definition, the unique characteristics defining

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V. OPERATING COSTS

FACTOR	KEY INDICATORS (e.g.)	DATA SOURCES (e.g.)
OPERATING COSTS	Development Costs	
	<ul style="list-style-type: none"> • Commercial Land Costs ➤ Site Availability ➤ Regulations / Zoning 	<ul style="list-style-type: none"> • Olcotts Blue Book ➤ City Planning Department Data
	Labor Force	
	<ul style="list-style-type: none"> ➤ Skills / Training Needs ➤ Experience / Reliability ➤ Availability ➤ Cost ➤ Turnover 	<ul style="list-style-type: none"> • Census, State Occupational Data ➤ City College Database ➤ Private Company Experience ➤ Original Survey Work
	Security (of Business and Customers)	
	<ul style="list-style-type: none"> • Frequency and Type of Crimes ➤ Perception/Reputation ➤ Police Response Time ➤ Bus. Insurance Claim Rates 	<ul style="list-style-type: none"> • Police Dept. Data by District ➤ Policy Dept. Data by Beat ➤ Private Company Data ➤ Insurance Data
Distribution Costs		
<ul style="list-style-type: none"> • Links to Distribution Channels • Access to Suppliers ➤ Quality of Transportation ➤ Infrastructure 	<ul style="list-style-type: none"> • Specialized ➤ City Dept. of Planning 	
Marketing Costs		
<ul style="list-style-type: none"> • Media Penetration • Advertising Costs ➤ Alternative Market Access 	<ul style="list-style-type: none"> • Nielsen, Arbitron, Direct Mail ➤ Initiatives Providing Access at Least Cost with Niche Market 	
Other		
<ul style="list-style-type: none"> • Insurance Availability/Cost • Utility Rates • Tax Rates ➤ Other Govt. Regulations ➤ Quality of Public Services 	<ul style="list-style-type: none"> • City/State/County databases ➤ Private Company Data 	

- Traditional indicators and data sources of market and site selection
- Criteria, data sources Shorebank The Business of Neighborhood Markets Framework

market access.

For each of these six factors, the Framework identifies indicators and related data sources to determine how and if they translate in the inner city. If they do not translate, the model identifies new, comparable indicators and data sources that provide an accurate assessment of inner city market

potential. Tables I - VI offer a sample of the detailed Framework or taxonomy, identifying conventional and inner city alternative indicators and data sources for each of the six factors used in market and site selection.

For example, demand is traditionally determined by a number of indicators such as population, consumer

VI. TRADE AREA DEFINITION

FACTOR	KEY INDICATORS (e.g.)	DATA SOURCES (e.g.)
TRADE AREA DEFINITION	Access	
	<ul style="list-style-type: none"> • Transportation • Nodes/Networks/Barriers • Vehicle Ownership • Traffic Counts 	<ul style="list-style-type: none"> • Specialized • Polk • Standard Auto Traffic Maps ➤ Any Source for Pedestrian Traffic Counts
	Media Penetration	
	<ul style="list-style-type: none"> See <i>Operating Costs, Marketing</i> 	
Gravitational Pull of Existing Businesses		
<ul style="list-style-type: none"> See <i>Business Climate, Market Gravity</i> 		
Competition		
<ul style="list-style-type: none"> See <i>Business Climate, Competition</i> 		

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Workplace vs. Residential Product Potential		
Austin Neighborhood		
Consumer Profile	Comparison To National Average	
	Residence	Workplace
Have a passport	66%	122%
Gourmet coffee beans	41%	106%
Own gas grill	42%	74%
3+ Bus. Trips by plane	33%	90%
Own/lease a Mercedes	64%	112%
Own computer	44%	86%
Own cellular phone	73%	93%
Own pager/beeper	113%	120%


Differences in demographics and lifestyle translate into differences in product potential between the residential and workplace populations.
 Courtesy of Claritas, workplace product line

spending power, and income (see Table I). In addition to traditional indicators, the Framework includes daytime/workplace population in an effort to more accurately assess demand. It then identifies a new data source – developed by Claritas – for evaluating workplace population. To illustrate, when daytime/workforce

data is included in the assessment of Chicago's Austin neighborhood, a market emerges with differing size, characteristics, and consumer demand than the market composed strictly of its residential population.

Other non-traditional market and site selection indicators and data sources identified in the framework

(and being collected for the Inner City Economic Database) include special census tabulations, tax records, bank records, and data from utility companies and credit agencies. These factors can all play a significant role in better estimating demand in inner city markets.

This example represents just a fraction of the Initiative's work in developing the detailed Framework. The Initiative is now beginning to serve businesses looking for specialized inner city data and expertise, and its capacity grows with each new participant. The Shorebank Corporation is looking to partner with more businesses in the Chicago area, seeking companies in diverse industries to provide input on data needs, test new approaches in the inner city, and share information on a confidential basis. The goal is to help businesses profit in the huge, untapped markets in the inner city, creating wealth for businesses and entrepreneurs, and building economically vital neighborhoods. 

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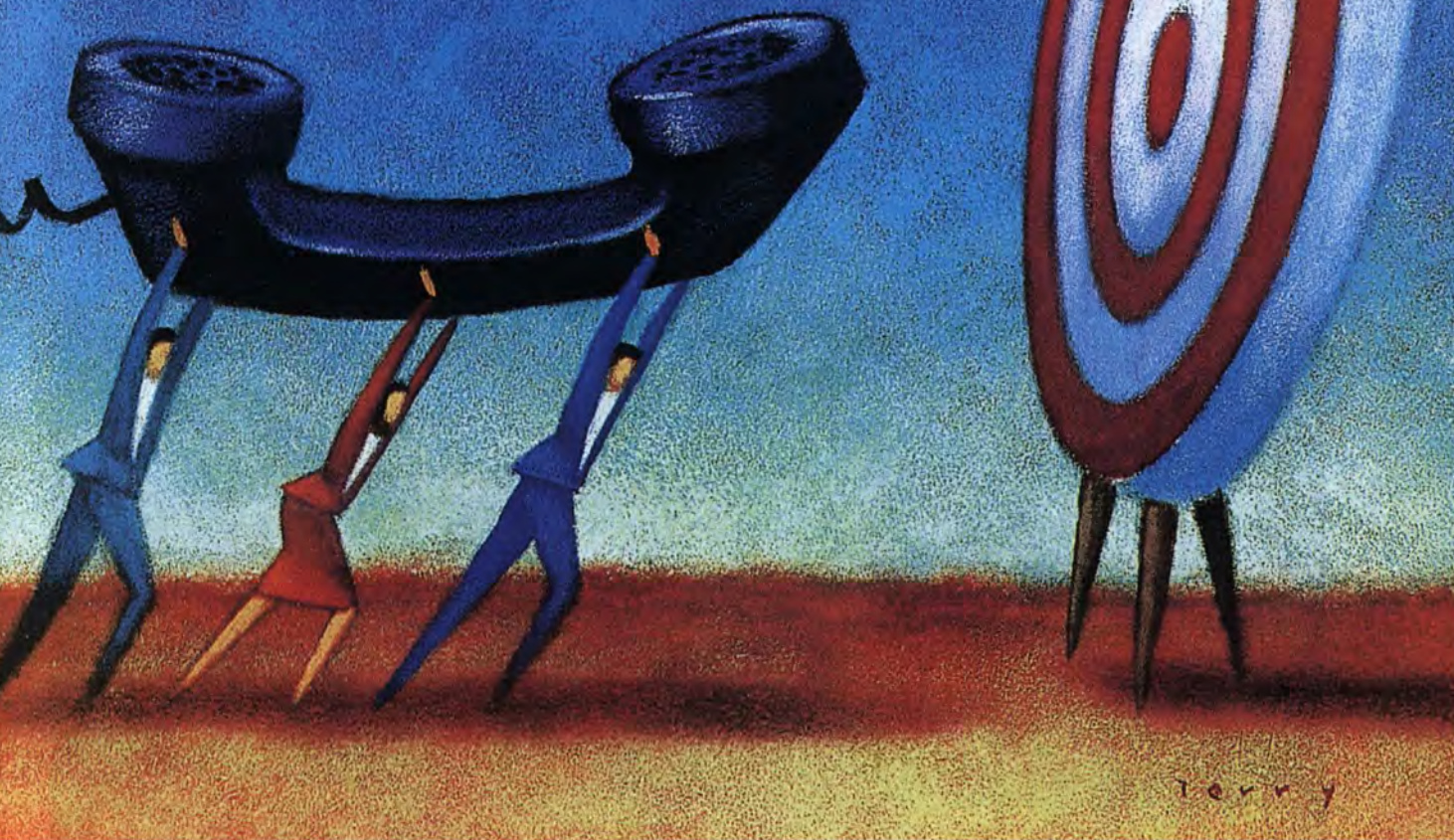
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By Margaret H. Blair and Hans-Willi Schroiff

Editor's note: Margaret H. Blair is president of rsc The Quality Measurement Company, an Evansville, Ind., research firm. Hans-Willi Schroiff is vice president market research/business intelligence at Henkel KgaA, Dusseldorf, Germany.

This article will review the empirical evidence which demonstrates that there is no such thing as brand building for tomorrow, without brand building and sales today.

Definitions/givens/points of agreement

1. *Brand-building*: advertising that

results in a brand's market performance (that is, sales) at some point in time.

2. *Today*: business results or sales occurring some time between seven days and six months after exposure to the advertising stimulus.

3. *Tomorrow*: market outcomes occurring at some time after that, from six months to five or more years after exposure to the advertising.

4. *Awareness and recall*: poor predictors of advertising's impact on market performance.

In numerous industry studies, recall has repeatedly failed to show a strong causal relationship to sales or share.

In his 1982 *Journal of Advertising Research* article, Harold Ross concluded that "recall is a very poor measure of a commercial's effect on consumer purchase." A year later, Larry Gibson (1983) found that "the evidence for the validity of recall is — to be charitable — 'checkered.'" In 1989, one of the top five global advertisers concluded from its studies that "related recall has no proven relationship to business measures."

In his review of the "How Advertising Works" study, Josh McQueen (1991) stated: "Did the recall wins match the in-market results? No. In 10 of the 16 results the

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answer was no. Less than flipping a coin." Finally, in a 1994 *JAR* article, The ARS Group stated: "Recall's track record is not much better than the 50/50 toss of a coin at identifying sales-effective advertising" (Blair et al., 1994).

Henkel has also observed the poor predictability of awareness measures. Exhibit 1 (which comes from IDIS —

that while awareness generally increases and decreases with media spending, there is virtually no relationship between awareness and market share.

5. *ARS Persuasion metric*: a predictor of advertising's impact on market performance "today."

The ARS Group has conducted and published numerous studies (including about 2,000 individual cases) sup-

porting the validity of the metric, with measurement periods ranging from four weeks to six months or so (Blair, 1999).

These validation exercises have supplied consistent evidence over a 40-year period.

They have been

and independently verified by David Stewart and John Philip Jones, both well-respected academicians. In science, "a theory that, over a long period of time, has yielded true predictions with unvarying uniformity, and is thus almost universally accepted, is referred to as a scientific principle or law" (Vilée et al., 1985).

Having established the "givens," our article will cover these points:

- Does advertising build brands today?
- Is there such a thing as brand building or sales for tomorrow without brand building and sales today (perhaps our most controversial and important topic)?
- How are brands built both today and tomorrow?
- The ARS Group's Branding Model.
- Two case studies that illustrate the findings and support the Branding Model.

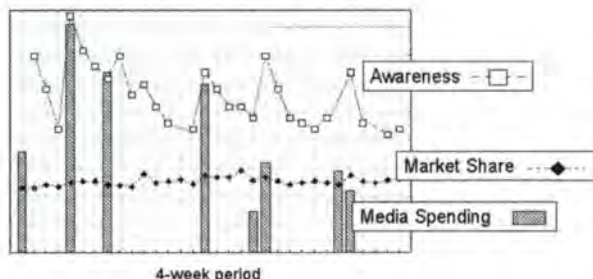
Does advertising build brands today?

The empirical evidence from a number of studies led the ARS Group to conclude: "Effective delivery of advertising occurs much faster (with diminishing returns), or with fewer GRPs, than has been indicated through traditional tracking measurements" (Blair, 1987). About three years later, IRI's Abraham and Lodish (1990) reported in the *Harvard Business Review* that: "When a particular advertising weight or copy is effective, it works relatively rapidly. Incremental sales begin to occur within six months." Then, five years after that, John Philip Jones' STAS ("Short-Term Advertising Strength") research led him to state: "STAS measurements establish reliably that advertising can have an immediate and short-term (seven-day) influence on sales" (Jones, 1995a). Of course, the size of this influence depends on the ad's persuasiveness or elasticity.

Most recently, the ARS Group documented the short-term effects of advertising on scanner sales, also demonstrating the wearout, or diminishing returns, phenomenon. (See Exhibit 2.) The largest effect is seen in the first four-week period after air-

Exhibit 1

Awareness Is a Poor Predictor of Market Performance (Henkel Example)



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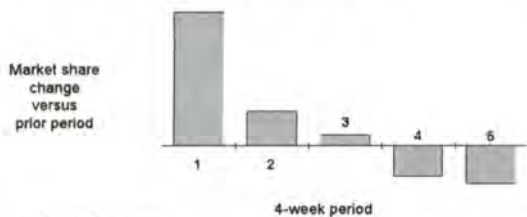


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Advertising Builds Brands Today (ARS® Group)



Source: Blair and Rabuck (1999)

An ad's selling power works quickly with diminishing returns.

ing. In period two the effects immediately begin to decline, and in periods four and five the ads are not even maintaining the levels achieved when they first went to air. Henkel has verified this wearout and diminishing returns principle or law and is using it for ongoing advertising investment decisions. As shown in Exhibit 3, the advertising starts, and the largest bump is in the next four weeks. As you can see, the effects begin to diminish in weeks 11 and 12 as the ad is wearing out.

strate that these short-term effects are necessary to achieve the longer-term effects. That is, there is no such thing as tomorrow without today.

Abraham and Lodish's "How Advertising Works" study (1990) led IRI to conclude that "if advertising changes do not show an effect in six

The bottom line? The empirical evidence supports the conclusion that effective advertising builds brands (produces sales effects) today.

Is there a tomorrow without today?

The most important point in this debate is to demon-

months, then they will not have any impact, even if continued for a year." Further IRI analyses (1990) found that "if an advertising test was not successful in year one . . . it would not become successful over time" (that is, years two and three).

Jones' work (1995b) also "rejects the possibility of a 'sleeper' effect — the supposed build-up of a campaign which does not work immediately and only causes sales to rise after a prolonged period of media exposure."

More recently, the ARS Group found

Exhibit 3

Henkel Example



HOW MUCH CAN YOU SAVE AT A NICKEL A NUMBER?



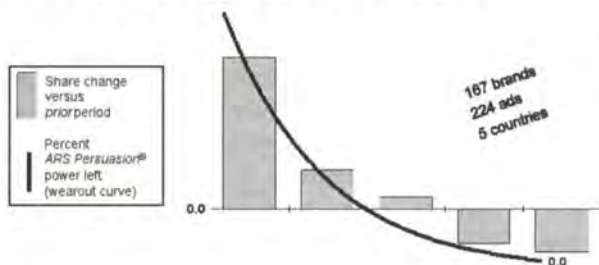
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An Ad's Selling Power Works Quickly With Diminishing Returns . . . And Wears Out In the Process



Source: Blair and Rabuck (1998)

that successful long-term brands continuously produce and air ads that build brand preference, sales, and share over time (Blair and Rabuck, 1998). In the study, 37 brands (with a total of 1,148 commercials) were sorted based on their sales performance over time. The brands that declined had an average ARS Persuasion level of just above three. Brands that maintained sales — or kept up with inflation — achieved an average score of +4.5 over the five-year period. The highest average ARS Persuasion levels were associated with the highest increases; the brands that grew (over inflation) did so with ads that scored an average of +5.7.

The bottom line? Short-term sales effects are necessary for long-term effects. That is, there is no such thing

as advertising that builds brands (produces sales effects) tomorrow, without building the brand (producing sales effects) today!

that tomorrow's success is the result of successes today and the next and the next, how do brands do it today and tomorrow?

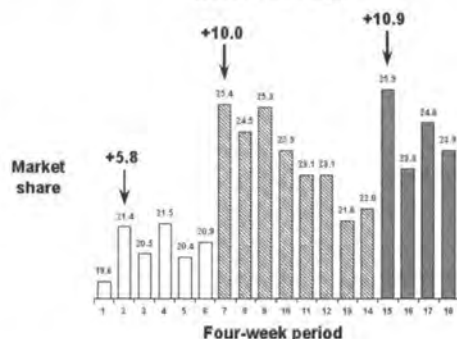
1. Strong selling proposition: They first start with a strong selling proposition on which to base advertising executions, because the strength of a brand's selling proposition is the most powerful factor determining advertising effective-

ness. ARS Group studies indicate that if you begin with a strong selling proposition, 70 percent of the resulting advertising executions will be strong. When beginning with an average proposition, only 10 percent of the ads will be strong. Finally, if you start with a weak selling proposition, the odds of attaining strong, sales-effective advertising are virtually non-existent (Shirley, 1999).

As Miner Raymond (1990) said, "Your commercial and your advertising can be no better than the copy strategy on which they are built. . . . It takes an awesomely poor execution to

Exhibit 5

Classic Campbell's Published Study (ARS Group)



bury a shining strategy. But no amount of executional brilliance can create a marketing strategy that isn't there."

2. Drivers of strong selling propositions: How do we develop a strong selling proposition or advertising idea? Uniqueness, or brand differentiation, is key here. Referring to the ARS Group's continuing study of factors related to sales-effective advertising, Allan Kuse (1991) stated: "Brand differentiation is the one element most strongly associated with superior ARS Persuasion results."

3. Execution: Once you have identified a strong selling proposition, there are some executional considerations that can be used to help ensure strong advertising. In Dartnell's *Advertising Manager's Handbook*, Tony Adams (1997) wrote: "ARS Validated Drivers indicate that when executing an ad, it is best to focus on the product, at the same time avoiding 'superfluous' executional details that will serve to detract from the mes-

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sage.”

4. Air, refresh, air, refresh: The next way that brands advertise effectively today and tomorrow is by accounting for the wearout factor, or following a systematic “air, refresh, air, refresh” process.

As was shown in Exhibit 2, an ARS Group study of wearout in scanner sales demonstrated that an execution’s selling power works quickly with diminishing returns. These diminishing returns seen in market performance have also been observed in the wearout of ARS Persuasion scores as the executions are aired. (See Exhibit 4.) Due to this predictable decline in sales-effectiveness, it is essential and practical to refresh the executions on a systematic basis.

The first example of a practitioner using this approach is the classic Campbell’s study published in the March/April 1992 issue of the *Journal of Advertising Research*. In this study you see effective advertising bringing about an immediate bump in share, then declining market share as the ad wears out. When the execution is refreshed with another persuasive ad, the cycle starts again, then again. Note that at the end of each period of airing, share remains at a higher level than before. (See Exhibit 5.) The more recent published Os-Cal case study provides another clear example . . . air, refresh, air, refresh. . . continuing to build brand preference, sales, and market share over time. (See Exhibit 6.)

5. Stay true to a consistent persuasive brand-differentiating strategy over time: In a 1994 study, the ARS Group found that nearly three-fourths (71 percent) of the superior persuaders produced by the long-term winners were based upon a brand-differentiating message, while only 25 percent relied upon “new news.” Although the testing history for many of these brands displayed periods of strategic experimentation, the ARS Persuasion results often steered the brands back to their basic bread-and-butter strategies. In a few moments you will see this principle in action when we look at our case studies.

Bottom line? In short, we have

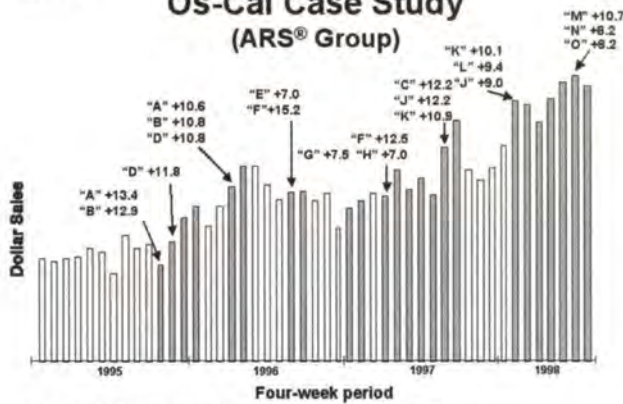
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Os-Cal Case Study (ARS® Group)



Source: *rsc. Quality Measurement™ in Advertising*, Vol. 4, No. 1, July 1999.

found that brands that consistently achieved success over the long haul tended to achieve that success by remaining true to the same persuasive brand-differentiating strategy over time.

Branding Model

I. The first component of the ARS Group's Branding Model is the development of a unique product that meets the needs/desires of (many) consumers.

brand (with its unique features/benefits and personality) in a consistent manner that builds brand preference, sales, share, and profits, both today and tomorrow.

IV. And when the brand's uniqueness/differentiation diminishes and is no longer generating the desired advertising and market performance, it is time to improve the product relative to its unique features (benefits) and/or revitalize the brand relative to its unique personality.

II. Then define the unique (differentiated) place the brand will own, over time, in the minds of consumers (that is, its features/benefits and personality).

III. Next, continuously advertise the

And, back to Stage III, continuously advertise the brand relative to these product improvements and/or revitalized personality.

Case studies

We'll examine the published Prego spaghetti-sauce study, in which the Branding Model and improved advertising process were followed over the first five years, then abandoned during the latter period. Then we will look at an 11-year Duracell case study in which the Branding Model and improved advertising process were followed over the entire 11-year period.

1. Prego spaghetti sauce (nine-year case study): In the beginning of the Prego case study, during Years 1 through 5, the average ARS Persuasion level for Prego's advertising was +8, and the brand's market share moved upward a whole 5-6 share points. This increase is only part of the story, since the market was growing at double-digit rates each year as well.

The researchers working on this Prego success said:

What underlies this five-year-long success story? A fundamental change in the advertising strategy and research process. Prego is the only Campbell's brand in the last five years to:

- consistently stay with the same (productive) selling proposition;
- (ARS) Persuasion test every poolout prior to airing;
- establish (ARS) Persuasion hurdles and stick to them;
- utilize outlook® to create an awareness of when to refresh (Adams, 1997).

Over the next four years, the Prego brand group drifted away from its successful selling proposition and advertising process. Prego's average ARS Persuasion level dropped to +4, only half of what it had been achieving during the successful five-year period. Share also declined, nearly reaching a nine-year low. (See Exhibit 7.)

Several selling-proposition tests were conducted for Prego in Year 5 because the brand group was bored with the current campaign. The results of Firststep testing suggested that, even after five years of use, the "thicker than Ragu" selling proposition that had been used for the first

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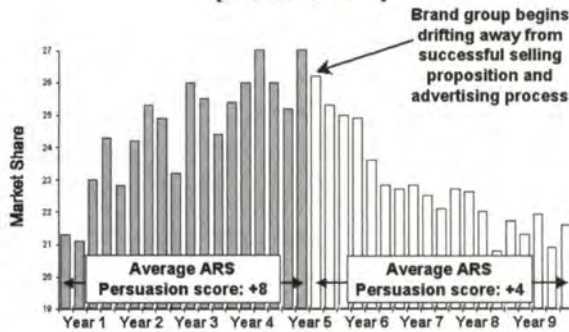
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Prego (Year 5-9+)



Source: rsc. Quality Measurement in Advertising, Vol. 2, No. 2, January 1998

five years still had superior selling power. In Year 9, another test of the original selling proposition indicated that after nine years it still retained its effectiveness. Not knowing this, the brand group and agency walked away from their successful “thicker/tastes better” strategy and started on a decline.

This case study offers a valuable lesson for achieving consistent advertising success and long-term brand health: once found, a persua-

Duracell and Eveready grew, but Duracell managed to take over and fortify the number-one spot, fueled by more persuasive advertising (an average ARS Persuasion level of +5.1, versus Eveready’s lower persuasiveness of +3.9). (See Exhibit 8.)

Duracell consistently followed the Branding Model. It stuck with the same brand-differentiating benefit (lasts longer) and brand personality (high quality/trustworthy) over the entire 11-year period. It has leveraged

sive brand-differentiating strategy needs to become the consistent part of a brand’s ongoing advertising program, until it is no longer successful.

2. Duracell batteries: During the 11-year study, both

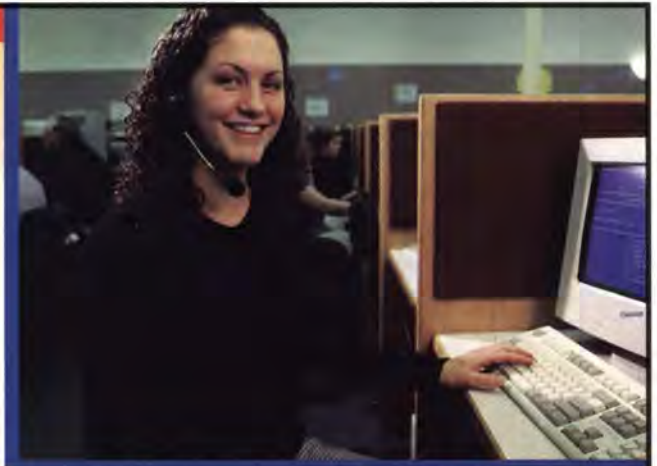
this consistent strategy and equity across time and the world, producing phenomenal marketing and business results. Our most recent Proprietary Brand Drivers reading indicates that Duracell’s “long-lasting” benefit is currently played back at two and one-half times the average ad. Its brand personality, “high quality/trustworthy,” is played back at five times the average ad, and its overall “equity” score is over three times the average. Note that these results are from a global ARS Group test, including feedback from North America, Latin America, and Europe!

Duracell’s brand building and equity can also be seen in financial terms. Duracell is the No. 1 player in the category with a market share of 44 percent versus Energizer’s 32 percent. Duracell has a higher price than Energizer, and — at \$609 million — its profits are over double that of Energizer. Translation: The market value of Duracell as a company was over \$8 billion, nearly triple that of Energizer.

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Conclusions

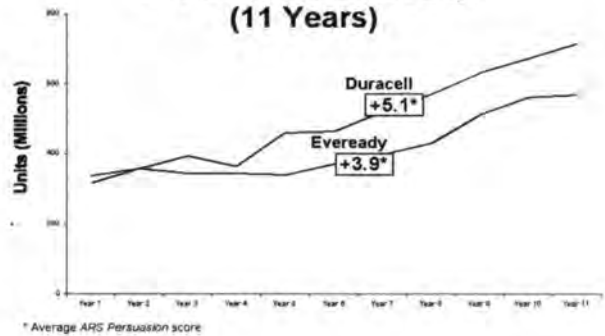
A healthy brand today is advertised in a manner that builds brand preference, sales, share, and profits today. A healthy brand tomorrow is a healthy brand today, and the next, and the next. A healthy brand today and tomorrow continuously executes and advertises its unique (brand-differentiating) features/benefits and personality over time.

Let's not oppress the industry with

what Collins and Porras (1994) call the "Tyranny of the OR," which "pushes people to believe that things must be either A or B, but not both. . . . A visionary company doesn't seek balance between short-term and long-term, for example. It seeks to

Exhibit 5

Duracell and Eveready (11 Years)



* Average ARS Persuasion score

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- San Francisco - Concord - Nichols Research, Inc.
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do very well in the short-term and very well in the long term."

And to quote Disney's Michael Eisner (Wetlaufer, 1999):

"A brand takes a long time to build, and a long time to destroy, and both happen as a result of lots and lots of small actions. If you want to be strong, each point along the way has to be as close to perfect as possible."

In other words, brand-building is for today AND for tomorrow! 

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PISCES

continued from p. 19

use of time.

The PISCES process

The PISCES process uses facilitation (Wittmer & Myrick, 1974; Isaksen, 1983) and creative techniques to blend the contributions of the left- and right-brains of business and it brings a balance between management

Plan	planning session
Imagine	idea generation — diverge
Select	idea builds — converge
Create	creation of strategic concepts
Evaluate	target audience focus groups
Start	action plan

and consumer. It brings about a union between the unexpected and the appropriate, utilizing the best talents of the participants to bring about the best results. It is based on the belief that

involvement of key parties from the beginning results in a process that is more effective and more efficient.

The PISCES process involves six steps (see box) with five phases. Common across the steps is the use of a variety of creative techniques that break down thinking barriers and that are fun. A trained facilitator keeps the process on track, introducing the activities and to moving the process along so that it does not lose energy.

The Planning step is designed to establish commitment to breakthrough ideas. The client and key people identify essential elements of the problem, they define the various perspectives in which the product or service may be viewed, objectives for the session are defined, and criteria for selecting ideas are established. In addition, they determine who the participants will be.

In the Imagine step, creative exercises are used to generate and build on ideas of what defines the product, who

the target audience is, what the attributes or benefits of the product are, where the product or service is offered, who is the key competition, and what the critical points are that create a difference between the product or service and those of the competition. Such techniques as brainstorming, brain writing, and photo sorting are used to generate ideas. Analogies may be used to stimulate creative thinking.

In the Select step, participants use different techniques to group and select ideas generated in the Imagine step. Visual methods such as dot voting with multi-color dots are used. Other approaches may include developing a matrix or clustering ideas.

In the Create step, strategies to differentiate the product or service are developed using the outcome of the Select step. A morphological matrix with such dimensions as target audience, competitors, benefits and attributes of the product or service is used to generate positioning statements.

In the Evaluate step, members of the target audience are selected to participate in focus groups. A custom guide for the focus groups is developed to meet the objectives of the study. The participants in the focus groups define the criteria that cause them to want to have that product or service and the attractive attributes of the product or service in a playful, open environment.

An action plan is developed in the Start step, defining what is going to be done, who will do it, how it will be done, and when. The action plan incorporates the creative inputs of the process.

Case study: an action plan developed for a community bank

Tucker Federal Bank and its advertising agency, Kilgannon McReynolds, both located in Atlanta, identified the need to create a clearer identity for the bank in the market. The PISCES process was used with key bank managers to define the image of the bank and to develop a marketing strategy to increase consumer awareness.

A planning meeting was held to identify who would participate in the creative session, where the creative

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session would occur, and to determine which data were available in terms of qualitative and quantitative research, e.g., awareness of the bank in the Atlanta market, image of the bank, number of customers, types of accounts these customers held and other information which could help to better understand the strengths and weaknesses of the bank. An additional planning point was the definition of the objectives of the session. A booklet was prepared for distribution to

participants prior to the creative session to stimulate their thinking about who the key competitors were and what were some of the differentiating aspects of the bank. Some general guidelines for the meeting were included.

The creative session, including the Imagine, Select and Create components of the process, was conducted in one day. The 12 participants included the CEO and officers from key functional areas of the bank and represen-

tatives from the advertising agency. It began with a review of the objectives and the guidelines for a creative session. A warm-up exercise was conducted to show how easy it is to see something in one way and how it is possible to re-examine the item and see it in an entirely different way. (There are numerous images available to illustrate this point, such as the well-known drawing in which one can see a young lady or an old lady, depending on perception.)

Divergence techniques were used to generate a list of potential competitors, then two key competitors were identified by consensus. A photo-sort was used to define the client. By sorting through pictures, participants were encouraged to tell stories about the customers' lives as seen through the pictures selected. The stories were about the customers, their lives, values and how they would interact with the bank, thus establishing profiles of the various segments of the customers. Brain writing and brainstorming were used to generate facts, attributes, and benefits about the bank and its competitors.

In brain writing, participants write their ideas on Post-it Notes and pass them around the group for discussion. Because these notes are anonymous, the process encourages participants who are not vocal or who may be subordinates of other participants, to contribute their ideas. The facilitator, through easel notes, creates charts as the participants talk and these charts are posted on the wall for later use in constructing the strategies.

Because of the multitude of ideas generated regarding the audience, the competition, the facts, attributes and benefits of the bank and its competitors, convergence exercises were used to narrow these lists and identify the aspects that most differentiated these components.

The convergence techniques included dot voting, which allows participants to walk around and assign a predetermined number of self-adhesive dots to those items that are differentiating to them and which they felt could be critical to the strategy statement.

Following the convergence exercise

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

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

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

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

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

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

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



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

Harvard Business Review
May-June 1998



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the respondents formed three groups of four and were given the assignment to develop strategy statements (the Create stage). When finished the groups presented their statements to the entire group of 12 and further comments and suggestions were made to strengthen the statements. These strategic positioning statements were further refined by the advertising agency and were turned into creative concepts to be tested in focus groups (the Evaluate stage). Finally, a marketing campaign was developed based on the outcomes of the process (the Start stage). The entire process took three weeks from start to the shooting of the advertising campaign.

A tracking study was conducted to evaluate the value of the marketing communications campaign.

Objectives of the marketing campaign

Tucker Federal Bank is running a new marketing communications campaign in the metro area that alternately involves cable television, radio,

newspaper, outdoor, direct mail and point-of-purchase advertising. The challenge faced by the bank was to establish a clear identity in a market that is already inundated by major bank advertising. The theme of the new campaign is to point out the bank's smaller size as being just right for the area. In addition, advertisements present bank services and the notion that the bank is active in the community.

Objectives of the current campaign are to achieve an 8 percent aided awareness of the bank's personality positioning within the targeted geography of the bank, achieve a 15 percent brand awareness of the bank in the Atlanta metropolitan area, and positively impact attitudes toward the bank.

The purpose of the tracking study was to determine if the bank's objectives were achieved, if the marketing strategy should be re-evaluated, and the impact of the bank's advertising on attitudes about the bank. These issues are not determined solely by the bank's new marketing communications

efforts. The active marketing of competitors in this market is also a determining force.

Tracking study methodology

The sample for this study was composed of 200 customers from Tucker Federal Bank's database (100 from the northern part of the Atlanta metro area and 100 from the southern part), 203 high potential non-customers (HPNCs) from the same zip codes (103 from the northern metro area and 100 from the southern part), and 100 other non-customers (ONCs) from the Atlanta metro area but outside the immediate range of the bank. Names for the latter two groups were generated by a survey sampling organization.

Respondents were at least 25 years old and the mix of males to females was approximately 50/50. Respondents were qualified as being the primary decision maker for the checking account in their household and as listeners to one of a group of radio stations (used in the radio marketing) on a regular basis. Interviewing was conducted during late October and early November 1998.

Respondents were asked to answer survey questions on the following areas:

1. Total unaided advertising awareness (first and other mentions): *Thinking just of the past six months, which banks have you seen or heard advertised?*

2. Total advertising awareness—unaided/aided:

- (unaided): *Thinking just of the past six months, which banks have you seen or heard advertised?* (Respondents provided names of banks.)

- (aided): *Have you seen or heard any advertising for the following banks?* (Respondents were asked for each bank not mentioned in the previous question.) *In just the past six months, have you seen or heard any bank advertising for* (names of banks were inserted)?

3. Advertising recall of Tucker Federal Bank: *Please tell me anything at all you remember about the advertising you recently saw or heard for Tucker Federal Bank.* [Probe until



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Proven recall was in the form of statements about the advertising campaign (bank size, aspects of the ads), bank services, local focus, and aspects of bank services (low rates, good checking, variety of services, loans, care for needs, etc.)

4. Main idea from the advertising: *What do you think was the main idea of the advertising for Tucker Federal Bank?*

Correct communication mentions included statements about elements of the campaign — bank size, services, customer service, local involvement, friendly, etc.

5. Slogan awareness: *Do you recall hearing (read the slogan) in any advertising?*

6. Overall satisfaction with primary bank: *Using a scale of 1 to 10 where 1 means "not at all satisfied" and 10 means "extremely satisfied," what number would you give to describe the level of satisfaction with your primary bank?*

Table I
Awareness And Attitude Tracking Study Results

	Tucker Federal Bank	High-Potential Non-Customers	Other Non-Customers
Unaided Advertising Awareness	34%	10%	5%
Total Advertising Awareness	73	44	23
Proven Recall	60	40	30
Major Point Communication	50	42	9
Slogan Awareness	67	42	30

Table II
Overall Satisfaction With Primary Bank

Ratings	Total (n=503)	Tucker Federal Bank Customers (200)	High Potential Non-Customers (203)	Other Non-Customers (100)
Ratings = 8-10	72%	83%	67% ^a	61% ^b
Average Rating	8.2	8.6	8.0 ^a	7.7 ^a

^a The difference in percentages between Tucker Federal Bank customers and HPNCs is statistically significant at the 95% confidence level.
^b The difference in percentages between Tucker Federal Bank customers and ONCs is statistically significant at the 95% confidence level.
^c The difference in percentages between HPNCs and ONCs is statistically significant at the 95% confidence level.
 Ratings are on a scale of 1 to 10, where 1 means "Not at all Satisfied" and 10 means "Extremely Satisfied."

Exceeded expectations

Results of tracking studies indicate that the outcomes of the process not only met but significantly exceeded expectations. Results of awareness and tracking questions (items 1-5 above) are presented in Table 1. Satisfaction

with the bank was higher for Tucker Federal than for other banks (Table 2).

The first objective was to achieve an 8 percent aided awareness of the bank's personality positioning within the targeted geography of the bank. In fact, 67 percent of the bank's cus-

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tomers had slogan awareness and 42 percent of the high-potential non-customers in the same areas.

The second objective was to achieve a 15 percent brand awareness of the bank in the metropolitan area. The tracking study results found a 52 percent total (unaided/aided) awareness of the bank's advertising among the total sample of metro area respondents.

The third objective of the marketing campaign was to improve attitudes toward the bank. Respondents who were aware of the ad campaign gave significantly higher ratings than respondents who were not aware of the ad campaign. Even among respondents who were customers of the bank, those who were aware of the advertising gave significantly higher ratings to the bank's variety of services and demonstrated higher knowledge about services than respondents not aware of the advertising.

Building on this success, the bank intends to extend the campaign until it begins to show signs of wearing out.

The bank has implemented additional programs directed toward the different customer groups at its branches. In keeping with the community theme, the bank serves cookies at the branches, organizes bus trips for senior citizens, and holds holiday events for families. In addition, management of Tucker Federal Bank intends to continue to use this creative process as a way of increasing involvement and commitment of the managers.


Suggestions for future research

An industry review is recommended to identify the most common practices used to arrive at positioning strategies among advertising agencies and corporations. These organizations are most likely to use positioning as a way to guide their marketing efforts. Such research can identify the key components and processes used and suggest possible applications across the board or within specific vertical industries because of special needs, e.g., consumer products versus business-to-business or utilities versus

deregulated industries or products vs. services etc.

Starting with secondary research and exploring the various industries, it would be prudent to identify as many segments as is practical so that potential differences can be identified and models like PISCES can be further refined.

Managerial implications

The creative process described in this article is effective for developing differentiation strategies for external customers. The process is efficient in creating increased commitment within an organization as well. The process can be used to develop vision, mission, common objectives, and strategy. Marketing and other consultants can increase client buy-in through active engagement of the client in the creative process, whether the customer is a group of consumers or one is building one-on-one relationships of business-to-business marketing. 

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Study examines soybean farmer e-com usage

Because of the many facets of e-commerce, there is a need to better define and more thoroughly research how farmers are using electronic services today and under various circumstances how they will use these in the future. To do so, Doane Marketing Research, Inc., St. Louis, is conducting a shared-cost market research study entitled "Drivers of e-Commerce Usage by Large Acreage Corn and Soybean Farmers." Only growers with 500 or more acres will be sampled. For more information contact Marypat Corbett or Jim Johnson at 314-878-7707 or at mcorbett@doanemr.com or jjohnson@doanemr.com.

New Net-based knowledge automation service

New York-based GroupSystems.com has partnered with Wirthlin Worldwide, a McLean, Va., research firm, to combine Wirthlin's Advanced Strategy Lab and GroupSystems.com's Internet-based knowledge automation service, GroupSystems OnLine. Advanced Strategy Lab (ASL OnLine) allows organizations to collect strategic information from participants around the world, simultaneously and anonymously. A facilitator moves the group through key questions, categorizes themes, prioritizes strategies or issues, and identifies appropriate action steps.

Wirthlin clients will use the methodology for strategic planning, product and marketing strategies, focus group sessions, organizational vision and mission statements, information technology implementations, employee feedback sessions and other critical business processes.

The Advanced Strategy Lab methodology is currently available on GroupSystems.com's new Internet-enabled GroupSystems OnLine service. GroupSystems OnLine is a knowledge automation service for e-business that enables team members, corporate partners, customers and stakeholders external to the organization to work together regardless of time or place. For more information visit www.groupsystems.com or www.wirthlin.com.

Site offers psychologist-designed surveys

CorporateSurvey.com, a Tulsa, Okla., consulting firm, has launched an Internet service providing on-line orga-

nizational survey products designed by industrial/organizational psychologists. These survey products can be administered on-line to employees and customers, and results viewed in real-time with on-line reporting tools. Survey products can be tailored to an organization's needs. For additional information and an on-line demo survey visit www.corporatesurvey.com.

Harris Interactive adds to panel line-up

Harris Interactive, a Rochester, N.Y., research firm, has created four specialized panels for conducting research in the business-to-business market segment. These panels include individuals throughout the U.S. that make or influence purchases: 38,988 information technology purchasers; 27,818 telecommunications purchasers; 40,574 office equipment purchasers; 13,406 small-business owners and 15,206 people who run offices or businesses from home (SOHO). Harris Interactive screened its panel of more



than 5.3 million participants to identify these individuals. For more information visit www.harrisinteractive.com.

New delivery system from Nielsen//NetRatings

New York-based Nielsen//NetRatings, the measurement service from Nielsen Media Research and NetRatings, Inc., has announced My Nielsen//NetRatings, an information delivery system for its Web-based audience measurement and analytical reports. My Nielsen//NetRatings helps analysts and planners make informed business decisions and extract Internet data and analyze Web site and advertising information.

The new information delivery system streamlines the process of viewing Nielsen//NetRatings data and reports. In one centralized location, businesses can track their at-work and at-home

Internet audience information and banner advertising, as well as data on other companies to conduct competitive analyses. My Nielsen//NetRatings personalized report settings are saved so that the data reports run each week and month are automatically pushed to the user's desktop.

Through strategic partnerships between NetRatings, Nielsen Media Research and ACNielsen eRatings.com, the Nielsen//NetRatings audience measurement service collects real-time data from more than 85,000 panel members around the world. The U.S. panel sample consists of 43,000 at-home users and 7,000 at-work users. International panels are under development with more than 35,000 at-home users currently being measured. For more information visit www.nielsen-netratings.com.

Simplified data mining tool debuts

Charlottesville, Va.-based MarketMiner Inc. has released MarketMiner Prophet, a data mining product. Like its sister products MarketMiner Express, MarketMiner Analyst, and MarketMiner Expert, MarketMiner Prophet requires no advanced knowledge of statistical analysis — just Windows 95, 98, or

NT.

In 10 steps, MarketMiner imports the customer and prospect data, standardizes the addresses, performs geocoding, appends demographic enhancements, and performs an automated analysis, helping the user identify the most valuable customers, best prospects, key market segments, and other information, including a similarity measure between current customers and prospects.

After scoring the proposed prospect list, MarketMiner produces an analysis package including an executive summary, marketing recommendations, and a series of charts, tables and graphs reports identifying the optimum market segments, key variables, and the proposed campaign's expected performance. For more information visit www.marketminer.com or call Patrick Hanrahan at 804-977-8606.

New QDA product from Tragon

Tragon Corp., Redwood City, Calif., has released its new Windows-based Interactive QDA (Quantitative Descriptive Analysis) software program, which features a menu-driven point-and-click format for analyzing results from sensory tests. The new program is based on the S-PLUS 4.5 statistical package using its data analysis and statistical modeling capabilities. Raw data may be easily imported into the program. Dialog boxes allow users the flexibility to choose statistical parameters for the analysis and subsequent reports and graphs. Graphical and numerical tools simplify panel performance tracking and measures differences among products. The program performs the standard QDA analyses such as analysis of variance, discriminant analysis, factor analysis, correlations, and various mean separation tests. For more information call 650-365-1833, visit www.tragon.com, or see Tragon's exhibit at the 2000 IFT Food Expo in Dallas on June 10-14.

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Survey Monitor

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very or not at all important now stands at 44 percent — the lowest percent in five years. Value continues to be the main reason people buy private label food products: 45 percent — the highest in five years — said that the one reason they buy private label foods is because private label is as good as the name brand and costs less. The second-most mentioned reason for buying private label foods is price: 35 percent of respondents said that they buy private label foods because they are cheaper. For more information call Michael Bixler at 912-228-1224.

Most Americans satisfied with their weight

Though you wouldn't guess by the number of weight-loss and fitness programs on the market, a Maritz Poll from Maritz Marketing Research, St. Louis, found that 68 percent of Americans say they are satisfied with their weight.

Not surprising, more men than women (77 percent compared to 59 percent) are happy with the numbers that register when they step on the scale. Young people are also more likely to be content with their weight. Seventy-nine percent of respondents ages 18-24 are happy with their weight, compared to 64 percent of respondents 55 and older.

Even so, 40 percent of poll respondents tried to lose weight last year. Forty-seven percent of women attempted to lose weight, as did 33 percent of men. Seventy-seven percent of those who attempted to slim down claimed to have been successful in their efforts.

Contrary to all the fad diets and quick fixes that flood bookstore shelves and television airwaves, most Americans do practice the most tried-and-true methods of weight loss: eating right and regular exercise. Sixty-nine percent of those who tried to lose weight did so by eating right/watching

calories/watching fat. Forty-one percent of respondents said they participated in a regular exercise program in hopes of shedding pounds.

More than half (56 percent) of respondents said they regularly take vitamins. Women are better about taking vitamins than men (62 percent vs. 49 percent), as are adults 45 and older compared to those younger (67 percent vs. 46 percent). Nineteen percent of Americans regularly take herbal supplements, such as ginseng, echinacea, and St. John's Wort.

Survey results are based on telephone interviews with American adults. Accuracy of the results is within ± 3.09 percent. For more information visit www.maritzpoll.com.

Movie site visitors less brand-loyal

Intensive on-line entertainment users are more fickle and less brand-loyal than other on-line adults when it comes to movies, according to Cyber

Dialogue, a New York Internet customer relationship management company. Data from Cyber Dialogue's Cybercitizen Entertainment Survey shows that while 28 percent of on-line movie fans reported their opinions of movie brands had changed as a direct result of visiting movie-related Web sites, the figure rises to 42 percent among more intensive on-line movie fans.

Intensive on-line movie fans are an extremely valuable target audience because of their high levels of movie consumption and spending. On average, intensive on-line movie fans watch two movies in the theater per month versus one for the general on-line population, they watch nine movies on cable TV or pay-per-view per month versus eight for the general on-line population, and they rent 14 videos per month versus only six for the general on-line population.

In terms of spending, this translates to \$15 per month spent in theaters for intensive on-line movie fans versus \$7 for the general on-line population, \$44



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per month on CATV spending versus \$37, and \$42 dollars per month on video rentals versus \$19.

In addition, as a result of movie site visits, 39 percent of intensive on-line movie fans said that they watch more movies in theaters; 37 percent say they watch more movies at home; and 20 percent said that they rent more movies to watch at home.

Cyber Dialogue also identified 11.8 million on-line movie fans that say they are interested in paying for a service to enable them to download movies directly to their TV, and 6.8 million who said they would pay for a service to enable them to download movies to their PC.

The findings are from Cyber Dialogue's Cybercitizen Entertainment Program (CCE). Cybercitizen Entertainment consists of in-depth interviews with 1,000 Internet users and 1,000 non-users conducted quarterly. For more information contact Larry Matthews 212-651-9174 or lmatthews@cyberdialogue.com.

College students are on-line buyers

A study revealed that nearly half (45 percent) of college students go on-line every day and that the average student has made four on-line purchases totaling \$305 during the past year. The most popular items purchased on-line include: music (46 percent); general books (42 percent); tickets (31 percent); computer peripherals (24 percent); and general software (19 percent).

The study, "Student Attitudes and Behaviors: Online Shopping," is the latest installment in the Student Watch Campus Market Research series conducted on behalf of the National Association of College Stores (NACS), Oberlin, Ohio.

Textbooks rated sixth on the list with just 18 percent of students reporting an on-line textbook purchase. Nearly three-quarters of the respondents reported their college store's Web site as the most likely source for textbook purchases despite aggressive advertising by dot.com

textbook sellers.

"The data in this study clearly corresponds to earlier NACS research where students indicated some hesitancy to buy textbooks on-line due to security concerns," says Julie Traylor, NACS director of planning and research. "College stores offer easy pick-up options, good return and exchange policies, buyback options and by virtue of their on-campus presence, may also offer on-line student shoppers some security as a well-known, local source."

The Student Watch study was developed and funded by the College Stores Research and Education Foundation, a subsidiary of the National Association of College Stores, and conducted by Sterling Research, St. Petersburg, Fla. Five additional volumes of data examine students' attitudes towards textbooks and course materials, technology and apparel and backpacks. For information call Laura Nakoneczny at 800-622-7498 ext. 2351.

Americans divided over women's rights

What do Americans really think about women's status? A study released by TNS Intersearch and GIA



(Gallup International) revealed that Americans are essentially divided about women's rights in America, with 47 percent claiming they have equal rights with men and 52 percent saying that they do not.

However, there was agreement on equal political leadership abilities among men and women and their equal right to a job. The results of the study revealed that almost half (47 percent) say that women in the U.S.

have equal rights with men, while the other half (52 percent) disagree. The figures differ by gender, with 56 percent of men, compared to 39 percent of women, saying that women have equal rights with men.

In terms of women's role in the workforce, almost three out of four men and women (73 percent and 74 percent, respectively) said that both husband and wife should contribute to household income. Even in times of job shortages, Americans believe that women have the same right as men to earn an income. Men disagreed by 83 percent and women by 81 percent to a question about giving men more rights to a job than women when jobs are scarce.

More than three-fourths of Americans believe that men do not necessarily make better political leaders than women. A combined 76 percent disagreed with the statement "On the whole, men make better political leaders than women do."

Eight in 10 Americans disagree with the statement "A woman needs to have children in order to be really fulfilled." But women felt stronger about this issue, with 86 percent disagreeing compared to 74 percent of men disagreeing.

Americans also believe that women must support the fight for women's rights in developing countries. Nearly three-quarters (73 percent) agree that women in advanced countries must promote the rights of women in the developing world.

The Millennium Survey polled over 50,000 participants in 60 countries about the same core issues addressed in the U.S. part of the study. The complete U.S. and Canada survey results as well as information about the other regions of the world in the study are available at www.intersearch.tnsfres.com.

Some on-line shoppers would like a CSR; new car seekers search Net

On-line shoppers said they would

buy more products on-line if they could speak with a customer service representative at the time of their purchasing decision. According to a survey conducted by NFO Interactive, a Greenwich, Conn., research firm, nearly 35 percent of 2,321 recent on-line shoppers said they would buy more if they could interact real-time with a salesperson from an e-commerce site.

The results of NFO Interactive's weekly on-line net.query survey also found that of those on-line users who have not yet purchased a product on-line, 13.7 percent would buy on-line if they could speak directly with a customer service representative.

"As Web site developers search for ways to attract people to their sites, they may well be missing a crucial element of effective retail strategy: personal interaction. Customer service is key to success; a helpful salesperson goes a long way to effecting a purchase," says Charles Hamlin, president NFO Interactive.

"Introducing live salespeople into the sales process — either through on-line chat or direct telephone connection as in conventional catalog sales — would serve to boost on-line sales. As manufacturers consider automating their channels, they should not lose sight of the effectiveness of personal contact."

The prospect of purchasing autos on-line was also posed to the 2,321 on-line shoppers through NFO Interactive's net.query. Clearly, on-line shoppers look to the Internet for information on prospective auto purchases, as more than 47 percent said they would use auto-oriented Web sites to gather information on dealer invoice/pricing information. Nearly 45 percent said when they shop for their next car, they will use auto Web sites to seek out independent evaluations and reviews. Interestingly, 10.6 percent said they would consider purchasing a car on-line without ever visiting the dealership in person.

This is crucial news for the automotive industry, as the affluent on-

line community comprises more than 37 percent of American households and controls more than 50 percent of U.S. household income. "While the number of households that have or plan to actually buy a car on-line is still relatively low, the Internet is now perhaps the strongest communication medium for automobile manufacturers to convey the features and benefits of their product. This could well bring about major change in the industry's choice of advertising

media as well as the roles and responsibilities of the dealer networks," Hamlin says.

Participants for the NFO Interactive study were acquired from the NFO//net.source, an on-line consumer panel. Among on-line shoppers, the collected data possesses a statistical accuracy of ± 3.54 percent. For more information call 203-629-4837 or visit the company's Web site at www.nfoi.com.

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Internet-based panel consisting of 1,000 executives from small- and medium-sized U.S. businesses.

As a result of a merger, Austin, Texas-based **IntelliQuest** will have changed its name to **Millward Brown IntelliQuest**.

Calgary, Alberta-based **Secret**

ShopNET has merged with **Service Intelligence**, a Seattle research firm, and will now operate under the name **ServiceIntelligence.com** and be headquartered in Seattle. The firm has relocated its Calgary office to 6940 Fisher Rd., S.E., Suite 125, Calgary, T2H 0W3.

London-based **Isis Research** has opened an office at Quarry Park Place, 9175 Guilford Rd., Columbia, Md., 21046. Phone 301-317-1000. Fax

301-317-1201.

Research firm **Gelb Consulting Group** has moved to 4611 Montrose Blvd., Suite A230, Houston, Texas, 77006. Phone and fax numbers remain the same.

@FocusRoom.com, a facility designed for hardware/software testing and other high-tech research needs, has opened in New York City. For more information call Amanda Karp at 212-935-6820.

New York-based **m@x RACKS, Inc.**, a postcard advertising firm, has engaged the **Traffic Audit Bureau** to develop an auditing methodology for the postcard-advertising medium. Auditing would provide advertisers with the number of people exposed to an advertiser's message on a postcard.

InfoTek, a Beaverton, Ore., research firm, has moved to larger quarters featuring expanded interviewing and recruiting facilities. The new address is 4915 S.W. Griffith Dr., Suite 200, Beaverton, Ore., 97005. Phone 503-644-0644.

Creative Research Services, Inc., Atlanta, has opened an account services office in Dallas. Frank McGinn has been named senior vice president and will manage the office, which is located at 9518 Brentgate Drive, Dallas, Texas, 75238. Phone: (214) 340-3725, E-mail: frank.mcgin@creativeresearch.com.

Chevron Corporation has selected the **Inquisite** survey system from Austin, Texas-based **Catapult Systems Corp.** to survey its 33,000 employees worldwide.

In March, Wilton, Conn.-based **Greenfield Online, Inc.** filed a registration statement with the Securities and Exchange Commission for an initial public offering of its common stock. The offering is being managed by Credit Suisse First Boston, Bear, Stearns & Co. Inc., and Donaldson, Lufkin & Jenrette. All shares are

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The Interpublic Group of Companies, Inc., New York, and **NFO Worldwide, Inc.**, Greenwich, Conn., have agreed to revised terms relating to their agreement and plan of merger dated as of December 20, 1999. The firms had previously announced a definitive agreement whereby The Interpublic Group would acquire NFO in a stock for stock transaction valued at \$26 per NFO share. Under the terms of the original agreement, NFO's stockholders were to receive a number of shares of Interpublic stock (the "Exchange Ratio") based upon the average closing price of Interpublic's common stock during the 10 trading days ending six business days before the closing date. The Exchange Ratio was subject to a collar, whereby the shares to be received by NFO stockholders were subject to a maximum of .5274 of a share, and a minimum of .3898 of a share, of Interpublic stock for each NFO share. In addition, if the average trading price of Interpublic's stock was below \$46.40 per share, NFO was entitled to terminate the transaction, providing that Interpublic declined to adjust the exchange ratio to provide \$26 per share in value. Under the terms of the revised agreement, the collar on the Exchange Ratio was modified whereby the shares to be received by NFO stockholders are now subject to a maximum of .5503 of a share of Interpublic stock. This modification ensures that NFO stockholders will receive \$26 in value if the average trading price of Interpublic's stock is between \$47.25 and \$66.70. In addition, NFO's right to terminate the transaction has been modified so that it is only exercisable if the average trading price of Interpublic's stock is below \$44.88. Finally, the parties have agreed to increase the termination fee payable to Interpublic in certain circumstances from \$25 million to \$30 million.

NFO also announced that it had received an unsolicited proposal to be acquired by an unidentified third party for \$27.50 per share payable in cash.

NFO's board of directors had made the determination required under the merger agreement with The Interpublic Group to permit NFO to enter into discussions with, provide non-public information to, and negotiate with this third party. However, during these discussions, the company determined that it was unable to accept this proposal, as certain terms specified by the potential buyer were unacceptable to the company. As a result, the NFO Worldwide board of directors rejected the offer and also determined that The Interpublic Group revised offer was superior.

New York-based **Nielsen/NetRatings** announced that its Internet measurement panels now have a total of 88,000 individuals under real-time measurement in the U.S., Japan, Australia, the U.K., Singapore, New Zealand and Ireland.

Anheuser-Busch has selected Schaumburg, Ill.-based **ACNielsen** U.S.'s Convenience Track as its syndicated source of sales information and insights for the convenience store channel.

LensCrafters has selected Chicago-based **SPSS Inc.'s** Clementine data mining software to enhance its data mining efforts.

Survey.com, a San Jose, Calif., research company, has entered into a research partnership with **The Data Warehousing Institute** (TDWI), an educational organization in the data warehousing and business intelligence market. Under terms of the deal, Survey.com's BI/DW Research Program and TDWI will jointly develop a series of primary market research surveys designed to assess user satisfaction with business intelligence software, services, and hardware provided by industry vendors and consultancies. Additionally, TDWI has agreed to co-sponsor Survey.com's Database Solutions III: Europe report, a research project designed to assess the state of the European business intelligence and data warehousing market. Separately, Survey.com has entered into a

research partnership with *Windows 2000 Magazine*. As part of the partnership, *Windows 2000 Magazine* and the BI/DW Research Program of Survey.com will execute a series of primary market research surveys over the next year. Separately, Survey.com has opened a European office in Surrey, England.

Rochester, N.Y.-based **Harris Interactive**, a leading Internet-based market research firm, and **Excite Canada**, a joint venture between Excite@Home and Rogers Media Inc., have announced a strategic relationship under which Harris Interactive will provide research and polling expertise to Excite Canada in return for links to its Harris Interactive Web site. The links will enable Harris Interactive to expand its population of on-line Canadian respondents.

New York-based **Medscape, Inc.**, a provider of health and medical information on the Web, and **United Information Healthcare Group** (UIHG), a Livingston, N.J.-based research firm, have formed an alliance to combine UIHG's capabilities in pharmaceutical research with Medscape's reach among physicians, allied health professionals and health care consumers. The companies plan to market and sell a new suite of services including both syndicated audits and custom research capabilities.

The Telecom Investor Forum at SUPERCOMM has selected **RHK** as its research partner. RHK, based in San Francisco, is a market research and consulting firm analyzing the public telecommunications network.

Tustin, Calif.-based **Scantron SurveySolutions** has added consulting services to its offerings. The company also plans to introduce benchmarking as a means of providing comparative data by industry and topic. The firm will also offer validated question item banks and benchmark research studies for various markets, including financial institutions, marketing research firms and human resources professionals.

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Data Use

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wide range of practical problems in which the choices of various customer groups are modeled as a function of a variety of marketing mix actions and differences in the individuals or groups making the choices.

2. Random utility theory-based choice experiments.

Until the work of Jordan Louviere, RUT-based choice models had been applied to analyze choices that could be observed in real markets, such as scanner panel choice data, observations of what customers chose reported in surveys, etc. Naturally, one cannot rely on such data for many strategic research problems, because of the following types of problems that frequently arise in real applications:

- a) Forecasting demand for new, or category-revolutionizing products.
- b) Forecasting demand for products in categories in which new and different attributes which were not previously a consideration in choice are introduced.
- c) Forecasting demand for products in categories in which attribute ranges are stretched well beyond those in present markets.
- d) Forecasting demand in markets in which serious multicollinearity is present among the predictor variables.

Louviere's research, since extended by him and others, focused on developing statistical design technology to systematically and independently vary predictor variables of

interest in a manner consistent with RUT and various multiple choice models derived from RUT.

The major advantage of this technology is that the strategic researcher is freed from the tyranny of real markets which are subject to market forces and constraints of technology. That is, the researcher can extend existing markets and even develop radically new markets by using principles from the design of statistical experiments to create markets offering products that do not now exist, products with attributes and/or attribute levels which do not now exist, and products whose attributes behave in statistically useful, non-collinear ways regardless of the existing pattern of collinearity in real markets.

3. Re-scaling of RUT-based multiple choice models

Ben-Akiva and Morikawa (1990, *Transportation Research*) and Swait and Louviere (1993, *Journal of Marketing Research*) showed that RUT predicted that a simple relationship existed between multiple choice models derived from choice experiments and multiple choice models derived from choices observed in real markets.

Since that time, a growing number of published papers have consistently verified the relationship, and affirmed the practical significance of the result: Choice models derived from experiments can be easily and theoretically consistently "re-scaled" to predict real market choices.

What is a choice experiment, and how does it differ from conjoint?

A choice experiment consists of two or more alternatives from which a target group of respondents are asked to choose, such as brands competing in a category or services such as airlines competing on the same city pair route. The choice alternatives are organized into sets called choice sets and each choice set presents either different subsets of competitors, different descriptions of competitors vis-a-vis their attributes or features, or both (see Fig. 1). In a typical choice experiment, each respondent will complete between six and twelve of these systematically generated cards.

Thus, a choice experiment involves the design of alter-

Fig. 1 - Example of one choice set

The credit card market				
	Citibank	Bank of America	Lloyds Bank	None
Annual Fee	\$100	\$50	\$150	I would not choose any
Type of Card	Visa	Visa	MasterCard	
Type of Plan	Gold Card	Regular Card	Platinum Card	
Auto Insurance	Yes, included free	Not available	Yes, costs extra \$50/year	
Card affinity available	Yes	Yes	No	
Credit Limit	\$5000	\$1000	\$5000	
Interest Rate	19%	12%	16.5%	
What card would you choose?	1	2	3	

natives and choice sets in which the alternatives appear. There are numerous ways to design such experiments, and as academic and practical interest continues to increase in choice experiments, the number of ways to design the exper-

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iments and the types of applications is growing rapidly.

Choice experiments differ from traditional conjoint analysis in many ways, despite the fact that many marketing

Fig. 2 - Example of one conjoint based profile

The credit card market	
	Citibank
Annual Fee	\$100
Type of Card	Visa
Type of Plan	Gold Card
Auto Insurance	Yes, included free
Card affinity available	Yes
Credit Limit	\$5000
Interest Rate	19%

How likely would you select this credit card?	Very Likely						Very Unlikely	
	1	2	3	4	5	6	7	8

researchers call choice experiments "choice-based conjoint," while other researchers try to position traditional conjoint analysis as choice experiments, and yet others try to pass off a variety of techniques completely unrelated to choice experiments as choice experiments!

In particular, traditional conjoint analysis is based on linear models, such as ordinary least-squares (OLS) regression or ANOVA models. In a traditional conjoint analysis experiment therefore, the objective is to design a set of product descriptions called "profiles," which are combinations of levels of a set of attributes being varied by the

researcher (see Fig. 2). Notice that no mention has been made of "choice sets" in which profiles or brands compete with one another for customer's choices. This is because traditional conjoint analysis profiles do not compete; rather, respondents from a target market express degrees of preference for each profile independently of other profiles. A single model which describes how preferences vary as a function of changes in attribute levels is derived for each respondent. Choices are simulated by assuming that each individual will choose that profile in a set of competing profiles that receives the highest predicted preference value.

In this sterile, unrealistic, profile evaluation environment customers cannot indicate that they would prefer not to choose *any* of the profiles. Of course, it is a feature of real markets that few customers always choose those consistently what they express preferences. In fact, we know that customers choices often vary, and that preferences can be quite inconsistent with choices. For example, you may prefer BMWs to Hondas, but choose a Honda because you cannot afford a BMW. As well, choices often vary due to a variety of things that cannot be observed and anticipated, such as a change in one's transport mode to commute to work due to weather, accidents, problems at home, etc. Thus, viewed from the researcher's view, choices *must* have a random element.

This random element of choice behavior in real markets is the principal focus of RUT (and from which RUT derives

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its name). That is, preferences, or "utilities" from an economic point of view, are inherently unobservable because they are in customers' minds. Choice experiments allow researchers to observe systematic variations in customer choices related to systematic variation in alternatives offered, attributes of alternatives, or both. Naturally, because choice behavior always contains a random element, researchers cannot perfectly explain choices. This "unexplained variation" in choice constitutes the random element.

Unfortunately, in traditional conjoint analysis no allowance is made for a random element in preferences or choices. Indeed, this is a rather glaring logical inconsistency insofar as conjoint analysts a) use a method to model customers' preferences which assumes a random element in preferences, but then b) use the resulting model to predict choices as if there were no random element. That is, choices predicted by traditional conjoint choice simulators are deterministic and make no allowance for random error in choices.

Real customers who make choices in real markets frequently decide not to choose. That is, for whatever reason, some customers choose to delay purchases or choose no products offered in a particular category. Examples of the former customers include millions of potential customers for PCs who know they eventually want to have one at home, but are waiting either for prices to drop further, or functionality to increase, or both. Examples of the latter customers include those who are allergic to chocolate, and hence, will not buy chocolate products regardless of the category in which they are offered.

Unfortunately, traditional conjoint analysis focuses only on preferences for profiles; and there is no theoretically acceptable way to accommodate a preference for "non-choice." Thus, even if a theoretically correct way were found to accommodate randomness in traditional conjoint preference models, there remains the problem of predicting non-choice. The logical consequence of limitation is that traditional conjoint analysis deterministically predicts the number of customers in a sample who are expected to choose a particular alternative given that they will choose an alternative.

The latter prediction is clearly of managerial interest, but accurate prediction requires a theory that takes randomness in choice into account, which traditional conjoint analysis does not. Furthermore, traditional conjoint analysts try to approximate this probability by rigorous pre-screening of customers to be sampled, which again represents a logical inconsistency insofar as this assumes knowledge or theory to determine explicitly which customers are in the target market of interest now, as well as which customers ever will choose a product in the target market. The choice experiment approach eliminates this logical inconsistency by allowing researchers to separate non-choice into as many strategically interesting sub-choices as required. For example, if one simply wants to know who will choose now, who will delay and who will never choose, choice experiment outcomes can be framed as a) choosing one of the

offered alternatives, b) choosing to eventually choose but not given the set offered, or c) choosing never to choose regardless of what is offered.

Another feature of real markets is that products or services can compete across manager-nominated categories, or even within the same category, different products may offer different attributes or different levels of the same attributes. Traditional conjoint analysis can deal with such issues only at the cost of considerable increases in the complexity of the experimental designs used to study preferences.

Conclusions

Despite its widespread popularity, conjoint analysis is riddled with logical inconsistencies that undermine the credibility of its predictive capabilities by modeling an unrealistic environment. Problems associated with conjoint analysis include:

a) Conjoint experiments present respondents with an unrealistic environment where they are expected to indicate preferences for a product or service without competition. Although most other market research applications also have some degree of artificiality, research should endeavor to define the most realistic experiments as possible.

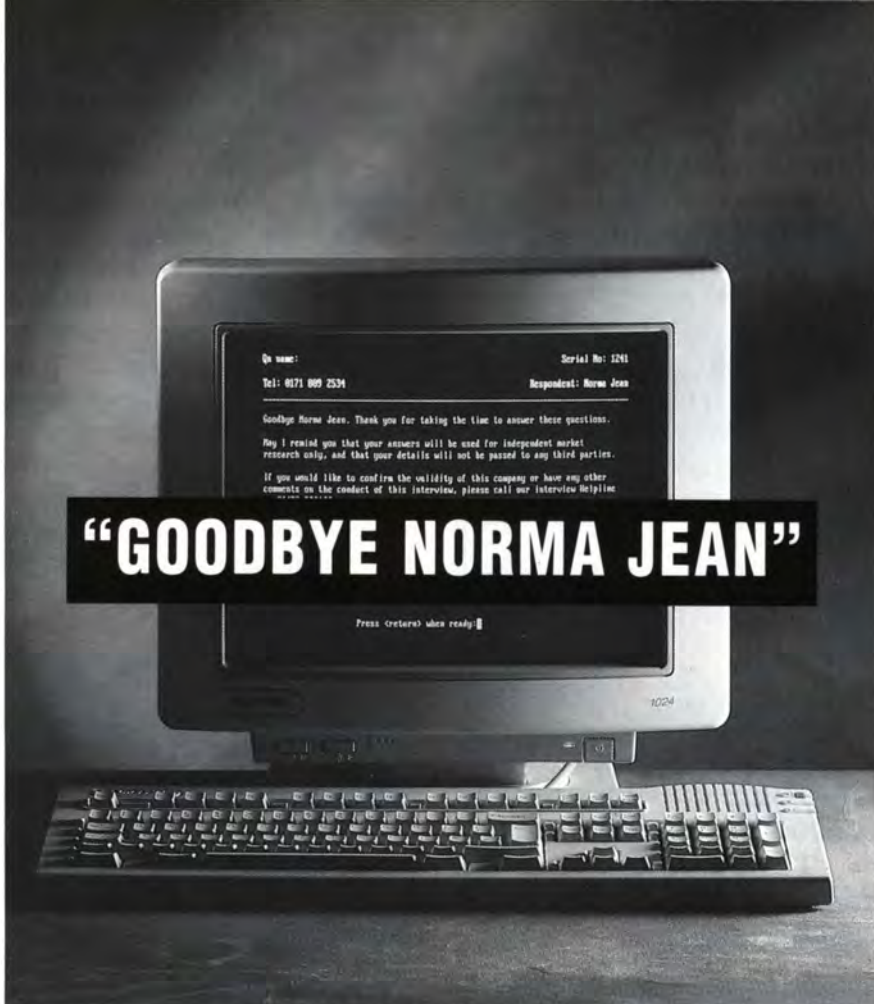
b) Conjoint experiments do not allow respondents to say they "would not purchase" given a set of attributes. This forced choice environment is completely unrealistic.

c) Choices predicted by traditional conjoint choice simulators are deterministic and make no allowance for random error in choices.

Fortunately for researchers, discrete choice modeling addresses all of the deficiencies associated with traditional conjoint analysis. By providing a more realistic choice experiment, discrete choice removes much of the uncertainty associated with traditional conjoint, and results in a more usable, predictive model. **74**

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Cold-calling

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tell the prospect: who you are; how you got their name; what you want; why they should listen to you; and what you would like to do for them.

Rule #5: Have a basic understanding of their business. Have some idea of what your prospect's product or service is and a general idea of how your firm can assist them. Typically, you should be able

to look at a corporation and, depending on the nature of their business, determine the likelihood of their utilizing market research services and if so, what services they are likely to need. Approach them with a straightforward specificity and they will respond.

Rule #6: Respect their current relationships. Your prospects are likely already involved with another research supplier at the time of your call. You are presuming to challenge

that relationship and, in effect, the prospect's judgement, by your cold-call. Current relationships are also used by prospects to shut down a cold-caller — another way of saying no. You should assume that the prospect has other relationships in place. Try to find out what needs are not being met and find a way to address those needs if you can. If all else fails, position yourself as an option, a possibility for the future.

Rule #7: Mimic speech patterns/speed. Listen to how a prospect expresses him or herself. This will be the first and most accurate indication of how that individual



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Listen to how a prospect expresses him or herself. This will be the first and most accurate indication of how that individual likes to receive and process information and will provide a useful clue to how to present yourself and your company.

likes to receive and process information and will provide a useful clue to how to present yourself and your company. Listen to how the prospect speaks, the speed, the vocabulary, how they enunciate, etc., and then seek to gently mimic this in your presentation. I am not suggesting that you speak with a Southern accent if you don't already have one, but use the prospect's speed and inflection



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during your presentation. If you are cold-calling a New Yorker, you may find that you will have to speed up your pace. If you are calling a prospect in Savannah, this same approach may be a turn-off. Listen and mimic for optimum acceptance.

Rule #8: Be truthful and to the point. Don't engage in trite telemarketing ploys. Don't ask a stranger how they are. You don't know them and they know you really don't care. Besides, how they feel is not the purpose of your call and they will take you more seriously if you don't sound like every other telemarketer that calls them. Don't pretend to know the prospect by asking for him or her by their first name. The secretary is a gatekeeper. The secretary is not stupid. Inferring that you are a friend of the prospect when you are not is dishonest. And, if you approach a prospect with anything less than honesty, what do you think their expectation of working with you will be? Avoid these tricks like the plague.

Rule #9: Be flexible in your script. Every newcomer to cold-calling should begin the process with a script. This should be a basic outline of what you want to say and the order in which you will say it. Your script doesn't have to be on paper, it can be in your head. But have a general idea for your own peace of mind. That having been said, you must also be prepared to deviate from the script as the conversation warrants. I've had many good laughs listening to salespeople respond to me in a way that clearly catches them following their script no matter what I say. Don't do that. Let go of the script and engage the prospect in a conversation. And, more importantly, listen to what is being said. Don't look for the next opportunity to get back to that script. Delivering a script only proves that you can read. It does not mean that you can communicate.

Rule #10: Be responsive. After the call, be sure to do what you said you were going to do for the prospect. Don't wait three weeks to send out

the follow-up materials, or ask the boss that question that the prospect wanted answered. Follow up quickly on your deliverables. Responsiveness is judged by many companies as the degree to which your company is interested in doing business with them. If they have to wait weeks to get preliminary collateral and promotional information they might be skeptical about your company's ability to deliver product or services on time and per spec. Finally, responsiveness keeps the conversation going — like a tennis match — and as such, is a very important ingredient in minimizing the length of the sales cycle.

More tips


Other tips which don't qualify as rules, but can be helpful are:

- If a prospect is not interested, he isn't interested and no act of God or man will change this. Part of good selling is realizing when to dedicate your efforts elsewhere.

- When you lose a bid — particularly if it was your first time bidding — always try to do a "post mortem" with the prospect. It is very important to find out why your bid wasn't successful so that you might submit a more compelling one next time. Every firm wants to know why they lost, but few will pick up the phone and ask. I urge you to do so each time a bid goes elsewhere.

- Try to make your cold-calls early in the week to maximize the number of return calls you will receive by the week's end. Don't ignore holiday periods and Fridays as good days to call as well.

- When leaving a voice mail for a prospect be sure to let them know who you are and why you've called. Most will call back and appreciate the courtesy. Explaining the reason for your call helps avoid angering prospects who return your call (on their long distance dime) only to find out that you want to sell them something.

I welcome your comments on my "Rules" and wish you good luck! 



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MarketResponse International

2000

***Telephone
Facilities***



Directory

This directory was developed by mailing forms to firms we identified as having telephone interviewing facilities. In addition to each company's vital information, we've included a line of codes showing the number of interviewing stations, the number of stations which use computer-aided telephone interviewing (CATI), and the number of stations that can be monitored on-site and off-site.

Codes - (e.g. 25-10-25-10)

1. STATIONS - No. of interviewing stations at this location
2. CATI - No. of stations using computer-aided interviewing
3. ON-SITE - No. of stations which can be monitored on-site
4. OFF-PREMISES - No. of stations which can be monitored off-premises

Alabama

Birmingham

Connections, Inc.
3928 Montclair Rd., Ste. 230
Birmingham, AL 35213
Ph. 205-879-1255
Fax 205-868-4173
E-mail: bwvconnect@mindspring.com
Rebecca V. Watson, President
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Fax 205-879-1058
E-mail: birmingham@consumerpulse.com
www.consumerpulse.com
Connie Glass, Director
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3000 Riverchase Galleria, Ste. 310
Birmingham, AL 35244
Ph. 205-443-5399
Fax 205-443-5389
E-mail: grahampga@aol.com
Cindy Eanes, Vice President
30-0-30-30

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3000 Riverchase, Ste. 405
Birmingham, AL 35244
Ph. 205-443-5350 or 800-289-7335
Fax 205-443-5340
E-mail: NSRJ@aol.com
Jim Jager, President
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Ph. 334-660-2910 or 504-522-2115
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E-mail: rsincorp@bellsouth.net
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Arizona

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Social Research Laboratory
Northern Arizona University
Box 15301
Flagstaff, AZ 86011-5301
Ph. 520-523-1515
Fax 520-523-6654
E-mail: Fred.Solop@nau.edu
www.nau.edu/~srl
Fred Solop, Associate Director
12-12-12-0

Phoenix

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8687 E. Via de Ventura
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Ph. 480-483-2700
Fax 480-905-1416
E-mail: Jack@acsinfo.com
www.acsinfo.com
Lucy Haydu
60-60-60-60
(See advertisement on p. 72)

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www.ruthnelsonresearchsvcs.com
Lincoln Anderson, Manager
20-0-20-1

Behavior Research Center
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P.O. Box 13178
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Ph. 602-258-4554
Fax 602-252-2729
E-mail: info@brc-field.com
www.brc-field.com
Earl de Berge, Research Director
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Creative Consumer Research
500 W. Broadway, #101
Tempe, AZ 85282
Ph. 480-557-6666
Fax 480-557-6534
E-mail: ccrphnx@aol.com
Sally Smith, Sr. Vice President
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Phoenix, AZ 85251
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E-mail: phoenix@focusmarketresearch.com
Ray Opstad, General Manager
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Michael J. O'Neil, Ph.D., President
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Fax 480-941-0949
E-mail: postmaster@qcs.com
www.qcs.com
Robert Dubbs, Branch Manager
14-0-0-0
(See advertisement on p. 113)

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Fax 602-735-3270
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www.researchresources.com
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Phoenix, AZ 85013-1150
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Fax 602-247-4477
Shelly Munoz, General Manager
125-125-125-125

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2400 E. Arizona Biltmore Cir., Ste. 1100
Phoenix, AZ 85016
Ph. 602-224-7979
Fax 602-224-7988
E-mail: tntwalker@aol.com
Wendy Walker, Exec. Vice President
10-0-10-0

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Phoenix, AZ 85016
Ph. 602-956-1001
Fax 602-224-7988
E-mail: tntwalker@aol.com
Wendy Walker, Exec. Vice President
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Phoenix, AZ 85016
Ph. 602-707-0050 or 800-999-1200
Fax 602-707-0055
E-mail: askarizona@westgroupresearch.com
www.westgroupresearch.com
Beth Aguirre-Smith, Vice President
50-50-50-50

Tucson

C P I
7756 E Broadway Blvd., Ste. 200
Tucson, AZ 85710-3942
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Fax 520-751-0900
E-mail: jpetrillo@cpisurveys.com
70-70-70-70

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Fax 520-886-0245
E-mail: FMRASSOC@aol.com
Sue Lunde, Field Director
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PhoneSolutions, L.L.C.
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Ph. 520-296-1015
Fax 520-296-3393
E-mail: michael@phonesolutions.com
www.phonesolutions.com
Mike Schlegel, President
75-75-75-75
(See advertisement on p 89.)

California

Bakersfield

Marketing Works
425 18th St.
Bakersfield, CA 93301
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Fax 661-326-0903
E-mail: marketworks@aol.com
Dee Simpson, Owner
35-3-12-0

Fresno

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1320 E. Shaw, Ste. 100
Fresno, CA 93710
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Fax 559-252-8343
E-mail: aisres@psnw.com
Jennifer Nichols, Manager
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Clovis, CA 93612
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Fax 559-298-5226
E-mail: bartels1@compuserve.com
Patrick Bartels, Vice President
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Nichols Research, Inc.
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Ph. 559-226-3100
Fax 559-226-9354
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www.nichols-research.com
Amy Shields
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Los Angeles (See also Orange County)

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Los Alamitos, CA 90720-2821
Ph. 800-493-1079 or 562-493-1079
Fax 562-493-6535
E-mail: akantak@appliedmktresearch.com
Dr. Anita Kantak, Principal
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George Wilkerson, COO
50-50-50-50

Codes - (e.g. 25-10-25-10)

1. STATIONS - No. of interviewing stations at this location
2. CATI - No. of stations using computer-aided interviewing
3. ON-SITE - No. of stations which can be monitored on-site
4. OFF-PREMISES - No. of stations which can be monitored off-premises

Assistance in Marketing/Los Angeles
949 S. Coast Dr., Ste. 525
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Fax 714-755-3930
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Cindi Reyes, Manager
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Long Beach, CA 90806
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Peter Carmichael, Manager
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Ken Gross, President
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Jennifer von Schneidau, V.P./G.M.
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(See advertisement on p.113)

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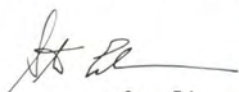
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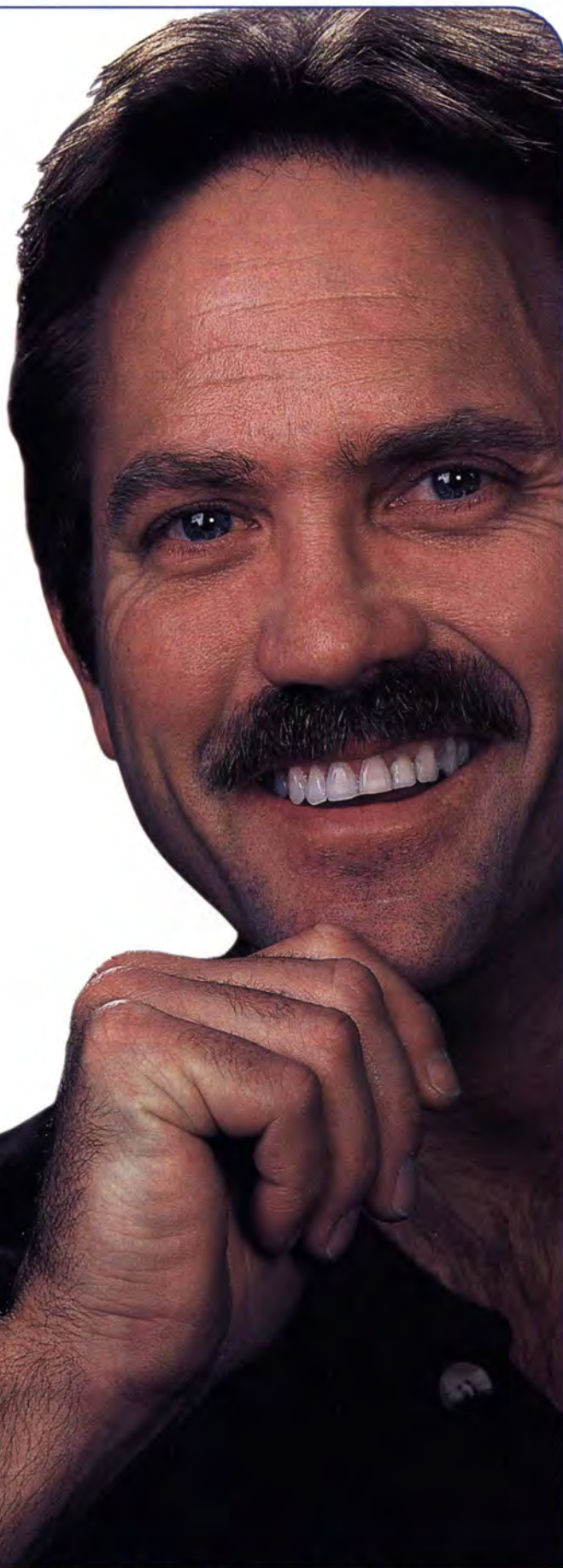
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(See advertisement on p. 99)

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32-32-32-32
(See advertisement on p. 97)

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14-14-14-0
(See advertisement on p. 117)

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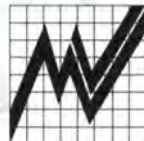
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(See advertisement on p. 43)

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Fax 610-941-2711
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Stephen Hollander, General Manager
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Douglas Elliott, President
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27-27-27-27

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Lisa Wilkins, Executive Director
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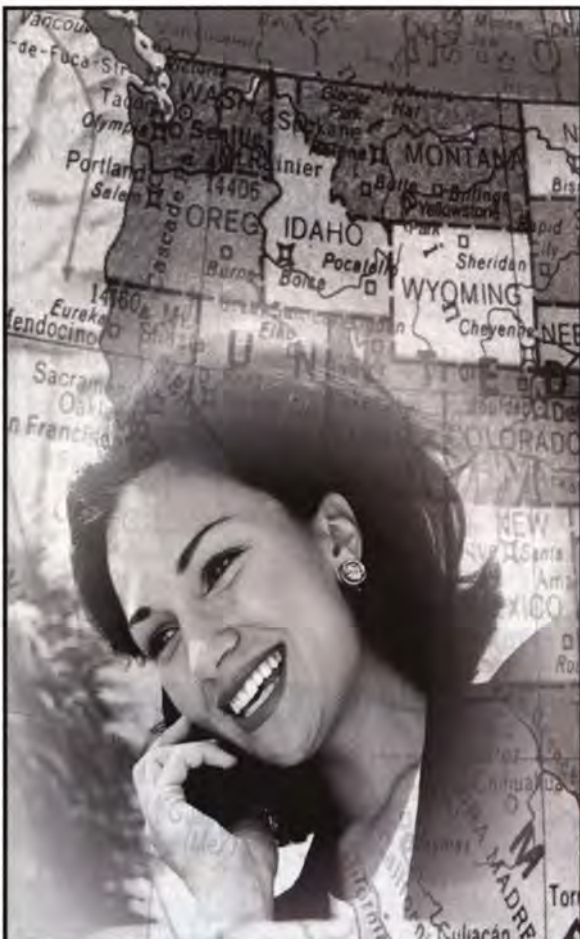
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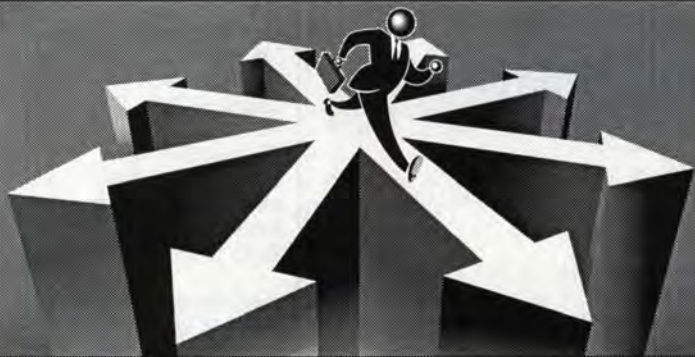
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(See advertisement on p. 33)

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(See advertisement on p. 12)

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(See advertisement on p. 33)

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(See advertisements on pp. 23, 25)

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Names of Note

continued from p. 10

director and **Susan Mullet** has been named data processing manager in the firm's Atlanta office.

Doane Marketing Research, St. Louis, has promoted **Jenne Ahlgrim** to support program manager.

Philadelphia-based *RSVP Research Services* has named **Neal Dranoff** vice president of client services.

Shop'n Chek, an Atlanta mystery shopping firm, has promoted **Carol J. McDermott** to director of operations.

InterSurvey, a Menlo Park, Calif., research firm, has named **Dan Fitzgerald** senior vice president, client development. And in the firm's new East Coast office, **Denise Stella** has been named vice president and managing director in charge of the consumer packaged goods practice on the East Coast.

San Jose, Calif.-based *Survey.com*, has named **Jack Mohally** chief financial officer.

Steven Jagger has been named managing director of London-based *Market Probe Europe*.

Guideline Chicago, a Lombard, Ill., research firm, has named **Lurana McParland** senior research manager and promoted **Peter Bernson** to vice president (data collection operations) and **Julie Lawson** to project director.

Shirley Sax has been named vice president of sales and marketing for the U.S. region at *FocusVision Worldwide*, a Stamford, Conn., research firm.

Madrid-based research firm *INNER* has named **Diana Chanquia**

managing director of *INNER* Argentina, and **Ana Paula Luz** and **Helena Palla** senior research executives at *INNER* Brazil.

Andrew Balbirer has been named chief financial officer at *Information Resources, Inc.*, Chicago. The firm has also named **Dan Sherr** executive vice president, strategic business development – new markets. In addition, **Dave Paragamian** has been promoted to division president – client service and **Angus Gephart** has been promoted to executive vice president – east area general manager.

Kelly O'Keefe has joined the board of directors of *Rasmussen Research*, Waxhaw, N.C.

The Arbitron Co., New York, has named **Julius Litman** vice president of product development, Arbitron Internet Information Services.

Jonathan Silver has been named *ICR*, a Media, Pa., research firm, as vice president – utility services.

Burke, Inc., a Cincinnati, research firm, has promoted **Rod Cober** to executive vice president.

Joe Jennings has joined *Marketing Systems Group*, Fort Washington, Pa., as vice president – sales for the GENESYS Sampling and PRO-T-S Telephony systems businesses. Also joining the firm is **Karen Flannery** as an account executive. She will be based on Chicago.

Mediamark Research, New York, has announced a number of new hires and promotions. The staff additions: **Paul Gold** has been named director, Mediamark Research Interactive; **Ramona Barnes** administrative clerk; **Leigh Ann Dykes** production supervisor, MRI+; **Patricia Harris** client ser-

vice representative; **Megan Janits** client service representative in the Chicago office; **Ed Levine** senior technical writer in data processing; **Yanira Nazario** staff accountant in finance and administration; **Nikkie Schmiegelow** database administrator. Promotions include: **Anne Drake** to vice president, manager of the advertiser/agency sales division and third party ventures; **Mike Drankwalter** to vice president, manager of the electronic media sales division; **George Kronheimer** to vice president, manager of the magazine sales division; **Karen Tubridy** to senior vice president custom research; **Regina White** to production manager.

Answers Research Inc., Solana Beach, Calif., has named **Lester Greenberg** director of international data collection and Web panel management.

CARMA International, a Washington, D.C., media analysis research firm, has named **Tom Vesey** managing director UK/Europe.

The Society of Insurance Research, Marietta, Ga., has elected **Michael Murray** as its president.

Joey Harmon has joined *Interviewing Service of America*, Van Nuys, Calif., as its vice president of marketing & business development.

FGI, Inc., a Chapel, N.C., research firm, has promoted **Thomas Mills** to senior vice president, chief marketing scientist.

Michele Iversen has been named chief financial officer at *The NPD Group*, a Port Washington, N.Y., research firm. In addition, **Carol Neithercut** has been named vice president, New Media Services.

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Trade Talk

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Management Consulting term which is defined as "the ability to continually assess the environment, particularly focusing on targeted customers, and to act on the signals that change is coming."

As a result, they can offer no real-life examples for readers to follow. But the book does give you the questions to ask that may lead you down the right path. And it makes concrete suggestions on systems to use to structure the questioning, and thereby erect a framework for future-looking.

Asking the questions is the easy part; the hard part, to put it mildly, is to secure upper management's commitment to research, along with buy-in from everyone in the company.


Dreaming is a luxury

Brainstorming, thinking outside the box — call it what you will, the ability to dream about what could be is, sadly, often viewed as a luxury. But the book makes a strong case for using research as a vehicle to see into the future, by talking to current and past customers and employees, by

learning from your mistakes instead of sweeping them under the rug, and by researching your competitors.

Research typically takes an idea, puts it in front of a group of people and measures their reactions. Granted, without brainstorming, there wouldn't any new ideas to pop in front of consumers, so somebody somewhere is doing some dreaming. But research is too often shackled to the here-and-now, trapped by the need to prove its worth and relevance, when ample proof exists that it has both.

The authors close by saying: "Our belief is that most researchers are not researching the future, and even fewer decision makers are pushing them to do so. Our hope is that the information conveyed in this book will help change this balance, that decision makers will demand more from their researchers, and that the researchers will meet the challenge."

Market Research Matters is the first step toward realizing that hope. 

Market Research Matters: Tools and Techniques for Aligning Your Business (312 pages, \$34.95), is published by John Wiley & Sons, Inc.

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Letters



"Consumers' contradictions: Value and other brand attributes" in the March issue of *Quirk's* is interesting, but may not be altogether valid, because of a design flaw. The second question ("Please indicate which features you feel best describe it") is not equivalent to the first one: use of the word "describe" has implications beyond mere association. The first question asks the respondent to fit an attribute to a company, while the second asks him or her to fit a company to an attribute. For instance, one may agree that the "best value" is offered by Brand X without agreeing that "best value" describes Brand X, because the outstanding attribute of Brand X is considered to be its taste or appearance. For any given attribute, the likelihood that the two questions will yield "consistent" answers depends on the position of the attribute in the respondent's hierarchy of importance. If the attribute importance is high, the answers are likely to be consistent. If the importance is not high, the attribute, even though it may apply to the brand, does not describe it; some other, more important attribute does that.

It would be interesting to see a similar consistency analysis based on results when the second question uses "apply to it" or "it offers," rather than "describe it."

Thomas T. Semon
Research Consultant in Marketing
Englewood Cliffs, N.J.



Trade Talk

By Joseph Rydholm, QMRR editor

Research as crystal ball

Research is commonly used to look into the future. It's called upon to answer questions like: How will this new product sell? Will anyone watch this sitcom? Does this movie have a chance at the box office? It can't predict exactly what will happen, but it's about the best tool that a business has to make an educated guess about how its products, services, or advertising will fare.

But research can do more, according to a new book, *Market Research Matters*. In addition to using research in the standard ways, authors Robert Duboff and Jim Spaeth believe that businesses should also use it on a more holistic, macro level, to look down the road at what's ahead. They write: "All too often, people use research to view the world only as it is and not to think about how it might be."

By expanding the scope of their research, companies can better anticipate their customers' new product needs, their competitors' actions, and identify previously unforeseen dangers and opportunities.

The book's somewhat vague title gives no clue to its intentions (something with a hint of foresight might have been more appropriate), but if readers look past that fact

they will discover an informed and passionately written argument for integrating research into all levels of a company's activities.

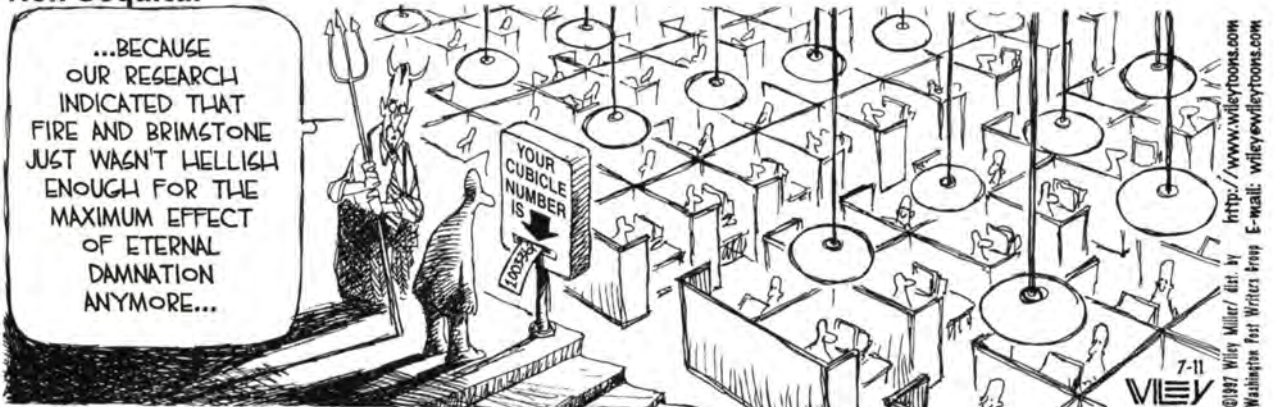
The book is dense (very little of the usual business-book fluff here!) but necessarily so, as they have a lot to cover in just over 300 pages, including showing readers how to use research to look at future brands, customer loyalty, the competition, sales channels, employee satisfaction, and the role of the Internet.

Aren't naïve

Duboff is partner and director of national marketing for Ernst & Young and also serves as chairman of the board of the Advertising Research Foundation (ARF). Spaeth is the ARF's president. The two are obviously sold on the value of research but Messrs. Duboff and Spaeth aren't naïve. They admit they know of no firms in which research plays an integral role in practicing what they call Strategic Anticipation® (must every idea or concept these days be trademarked, registered, or copyrighted?), a Mercer

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Non Sequitur



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