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Marketing Research Review

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February 2001

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# QUIRK'S

Marketing Research Review

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## Many trends on display at housewares show

Consumers are searching for the creature comforts of home – retro-style designs, casual-themed home decor, and relaxation and spa-therapy personal care appliances – as an escape from their everyday routines, according to trends and products on display

at the 2001 International Housewares Show at McCormick Place in Chicago in January.

For years, the casual living trend has been driving sales of housewares and home furnishings products and that trend shows no sign of diminishing. With consumers spending more time indoors, they are also spending more money on home furnishings and housewares. Yet, while many con-

sumers are making their homes a haven, they are not willing to sacrifice convenience to achieve that casual lifestyle.

According to consumer research compiled by Riedel Marketing Group, Americans are eating at home more now than they did two years ago. However, while Americans are eating at home more, that doesn't necessarily translate into more cooking at home. To save time and make life simpler, consumers are relying on investment cooking – cooking a variety of dishes at one time and freezing some for later use.

The need for convenient products is not limited to the kitchen. Americans want their homes to be clean but they want to spend as little time as possible doing housecleaning chores.

For years, Baby Boomers have been the primary purchaser of housewares products. However, Generation X and Generation Y – those consumers aged 18 to 34 – are beginning to make their mark on the housewares industry with their purchasing power and diversity in tastes.

Once again, the booming economy, coupled with the casual living trends, prompted many consumers to invest time and money in their home. Statistics show housing entered the 21st century on a high note, breaking records for home sales, homeownership rates and the value of residential construction, according to the Joint Center for Housing Studies of Harvard University.

Following is an overview of new products and trends seen at the 2001 International Housewares Show (for more information visit [www.housewares.org](http://www.housewares.org)):

- Versatile cookware that functions as bakeware, serveware and dinnerware is becoming increasingly popular as the casual entertaining trend continues.
- As outdoor grilling becomes a

continued on p. 63

## Usability more important than speed to Web site appeal

Research from San Francisco-based Modalis Research Technologies, Inc. examining the 130 most-visited Web sites in the U.S., Germany, France, Sweden and the U.K. indicates that site usability ratings are more important than speed or other technical performance measures in generating overall appeal.

The study examined sites by evaluating the user's experience according to seven recognized industry standards (usability components): intuitive navigation, functional design, efficiency in dealing with different levels of user expertise, minimalist design, robust error management, help and documenta-

tion functions, and accurate system feedback to the visitor. Each site's technical performance was also evaluated using measurements of download times, browser compatibility, number of broken links, and number of HTML errors.

The results confirm that unless there is excessive technical failure, users perceive and remember the technical aspects of a Web site based on their success in using the site, not the site's

actual performance. These findings confirm that a strong link exists between site usability and overall appeal and almost no link between technical metrics and appeal.

"Concentrating simply on fast page loads and other 'hard' measurements at the expense of a superior user experience appears to be counter-productive," says Bill MacElroy, president, Modalis.

Seven of the sites that are found in the top 10 for usability ratings are also found in the top 10 for overall appeal. Only one site that rated in the top 10 for performance metrics also rated in the top 10 for overall appeal. The 10 sites with the best usability rating scores are: Amazon.com; Gator.com; Napster.com; Excite.com; Google.com; Homestead.com; Yahoo.com; CDNow.com; Disney.com; Mapquest.com. Yahoo.com is the only site that appears on top 10 list for the three categories: overall appeal, usability rating and technical performance. For a copy of the full study visit [www.modalis.com](http://www.modalis.com).







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**Robert H. Steinfeld**, senior vice president, tax and corporate development, has been named senior vice president, general counsel and corporate secretary at *IMS Health*, a Westport, Conn., health care information firm.

**Lynd Bacon** has joined Menlo Park, Calif., marketing information firm *Knowledge Networks* as senior vice president and chief scientist. In addition, **Suzanne DuFore** has been named vice president and managing director of custom research, **Melinda Smith de Borrero** has been named vice president and managing director of marketing science, and **Jay Mattlin** has been named vice president for media planning research.

*Galloway Research Service*, San Antonio, Texas, has named **Carlos Jáuregui** research group department director.

Coinciding with the acquisition of *Footwear Market Insights* (FMI), a Nashville, Tenn., syndicated consumer purchase information company, by *NPD ShoeBiz*, the footwear tracking unit of Port Washington, N.Y., marketing information provider the NPD Group, Inc., **Michael J. Kormos**, president and founder of FMI, will join the NPD ShoeBiz team. NPD ShoeBiz and Kormos will build on NPD's footwear

point-of-sale (POS) service and newly launched consumer tracking service.

*The Marketing Research Association*, Rocky Hill, Conn., has named **Marty Rotblatt** operations director.

Wilton, Conn.-based research firm *Greenfield Online* has named **Rick Allen** senior vice president for global client development.

*SPSS Inc.*, Chicago, has named **Sarah E. Mattingly** director of partner alliances for the North American public sector business unit.

**Josh S. Weston**, honorary chairman of *Automatic Data Processing, Inc.*, has been elected to the board of directors of Aegis Communications Group, Inc., an Irving, Texas CRM and research firm.

Chicago-based *SPSS MR* has named **Jim Whaley** national sales manager for North America.

*Opinion Research Corporation*, Princeton, N.J., has added three new independent directors to its board of directors. Joining the board are **Seth J. Lehr**, partner of LLR Equity Partners, L.P.; **John J. Gavin**, president and COO of Right Management

Consultants, Inc.; and **James A. Bulvanoski**, CEO of SPT Electric. Including these new members, Opinion Research now has nine members on its board of directors.

New York-based *MarketingInfo.com, Inc.*, an online market research information source, has appointed **Ernest von Simson** to its board of directors. He is senior partner of Cassius Advisors, a consulting firm.

**James Velayas** has been named vice president of marketing research at *Porchey Research*, St. Louis.

*The Arbitron Company*, New York, has appointed **Troy Howard** national accounts manager for advertiser/agency services. In addition: **Cathy Kaufman** has been named account manager for advertiser/agency services in Atlanta; **Lovlyn Corbett** has been named account manager for Eastern advertiser/agency services; **Michael Hopkins** has been promoted to advertiser/agency manager for webcast ratings; and **Ed Cohen** has been promoted to vice president, domestic radio research.

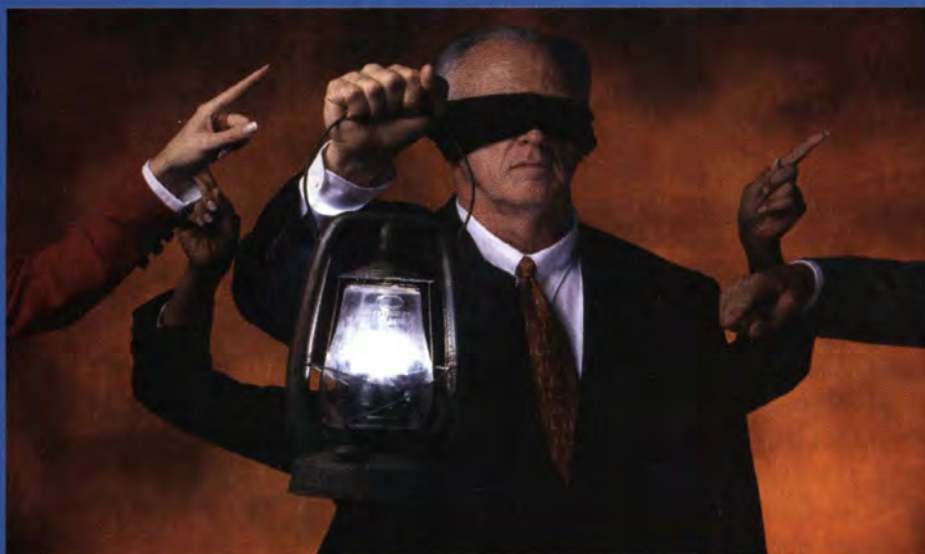
**Dale Watt** has joined *Market Probe, Inc.*, Milwaukee, as vice president and branch manager of the firm's Atlanta office.

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## New Web-based phone survey app

QuickTake, a Wilton, Conn., Web-based information ASP and part of Greenfield Online, and NetByTel have joined forces to deliver a Web-based telephone survey application using speech recognition to bridge the gap between online and offline populations. The partnership enables users of QuickTake, Greenfield Online's self-directed survey tool, to create customized automated surveys that gather real-time information from offline respondents by standard or wireless phone. The exclusive NetByTel agreement lets QuickTake customers create custom phone surveys for key audiences, and view the real-time results online in a password-protected QuickTake account. The QuickTake interface uses NetByTel's technology to interact with customers and tabulate the results. A pre-recorded voice or speech synthesizer reads the survey questions, while NetByTel's voice recognition based technology logs the respondents' spoken answers in real time. The alliance will also provide NetByTel with access to exclusive online research from Greenfield Online.

## IMS tool analyzes global pharmaceutical market

Westport, Conn., health care research firm IMS Health has launched Growth Analyser, a strategic planning tool that identifies the various factors contributing to the growth or decline of a market or market share in the \$359 billion global pharmaceutical marketplace. Growth Analyser enables pharmaceutical decision-makers to compare and con-

trast growth trends among countries, gauge the effectiveness of sales strategies, and react to local market changes. Growth Analyser measures growth from new products, line extensions, price changes, volume changes, exchange rate changes, and the interactive effect of price and volume changes. Insights can be organized and sorted by country, pharmaceutical company, nationality and product classification group (Anatomical Therapy Class). Sales information is provided in local currency (dollar), U.S. dollar, euro and specific growth categories. For more information contact Paul Jenner at [pjenner@uk.imshealth.com](mailto:pjenner@uk.imshealth.com) or visit [www.imshealth.com](http://www.imshealth.com).

## Research site focuses on utility industry

Consulting firms the C Three Group and the Ascent Group have formed a joint venture, Competitive Market Intelligence (CMI), a secure, database-driven Web site, accessible only to subscribers. The content of CMI is driven by subscribers and provides market research and analysis. In addition, subscribers have access to the intellectual capital of the consultants at the C Three Group and the Ascent Group. Initially, the database will cover investor-owned electric and gas North American utilities, but will be expanded to cover government- and locally-owned utilities, and major utilities outside the U.S. Vendor coverage includes all major back-office functions such as billing, call centers and metering as well as addressing the rapidly increasing interest in outsourcing and application service providers. Major investor-owned utilities are profiled including AEP, Avista, Southern Company, Entergy, FPL Group, SCANA, Duke Energy,

Dominion, and Excelon. Major vendors to the industry are also profiled including SAP, SPL WorldGroup, Peace, ABB, Siemens, HP among others. For more information visit [www.competitivemarketintelligence.com](http://www.competitivemarketintelligence.com).

## Panel management software from Sage

Sage Research, Inc., Natick, Mass., has introduced PanelWise, its proprietary panel management software. PanelWise is designed to streamline and automate many panel management functions. Its features include: tools to track and report demographic information for each panelist, which eliminates the need to repeatedly collect this data each time a panelist is surveyed; rule-based mechanisms to ensure panel members are not being over-surveyed; automatic e-mail reminders to boost response rates; reports about survey completion statistics for laggard identification and incentive administration; and selection capabilities that allow targeted samples to be drawn based on a combination of multiple, relevant criteria.

Sage has tested and refined PanelWise by using it to manage its own three panels of pre-screened professionals. The first two panels are comprised of IT professionals from small and medium businesses, and large enterprises, while the third panel is comprised of service providers including ASPs, CLECs, ILECs, ISPs, and IXC's. For more information visit [www.sageresearch.com](http://www.sageresearch.com).

## 2000 retail census from ASW

MarketPlace Intelligence, part of New York-based Audits & Surveys

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JOHN: Welcome to ActiveGroup everyone. With this new service you can watch focus groups or interviews live and on demand from wherever you are. All you need is Internet access.

PAULA: So I can watch this group from home or my office?

JOHN: That's right. The group still occurs at the facility but you can watch it anywhere. If you do not want to watch it live, you can come back and watch it on demand for up to 30 days

MELISSA: So I can log off now and go to my son's baseball game but come back tomorrow and watch this event for as long as I need to?

JOHN: Yes, you've got it! It's that simple.

BILL: And since you are at the facility, we can send questions to you and you can get those questions to the moderator?

JOHN: Yes. All of the viewers who are watching live can submit questions. That way, an off-site viewer can control the direction of the group based upon the feedback from the respondents.

MELISSA: This sounds too good to be true, Where can I get more information about this service?

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## News notes

**ACNielsen Corporation**, Stamford, Conn., has entered into an agreement under which VNU N.V. will acquire all of the common stock of ACNielsen for \$36.75 per share in cash. The aggregate value of the transaction will be approximately \$2.3 billion. In addition to adding AC Nielsen to its stable of companies, the all-cash deal reunites AC Nielsen with Nielsen Media Research.

VNU acquired the TV ratings firm in fall 1999 for \$2.7 billion. Both Nielsen-branded companies had been owned by Dun & Bradstreet, which purchased AC Nielsen in 1984 for \$1.3 billion. In 1996, Dun & Bradstreet split into three companies. AC Nielsen became a standalone company and Nielsen Media became a part of Cognizant. VNU said it would seek bank financing to fund the purchase

and look to sell its consumer and educational information groups in Belgium and the Netherlands.

**Greenfield Online Inc.**, a Wilton, Conn., research firm, has withdrawn an \$86.3 million initial public offering of common stock because of unfavorable market conditions. Greenfield reported the move in a filing with the Securities and Exchange Commission,



The Institute for International Research will present a conference on ethnographic/observational market research on February 22-23 at the Regal UN Plaza Hotel in New York. For more information visit [www.iir-ny.com](http://www.iir-ny.com).

Tragon Corporation will hold a workshop titled "Gaining a Competitive Advantage Through Sensory Evaluation" on March 5-7 at the Sheraton Palo Alto, Palo Alto, Calif. For more information call 800-841-1177 or visit [www.tragon.com](http://www.tragon.com).

The Advertising Research Foundation will hold its annual conference and infoplex at the New York Hilton on March 5-7. For more information visit [www.arfsite.org](http://www.arfsite.org).

Sawtooth Technologies will hold the following seminars near the company's offices in Evanston, Ill.: conjoint analysis: theory and practice, March 12-13; introduction to the ACA System, March 14; introduction to choice-based conjoint, March 15. The seminars are designed for researchers who have had little or no practical exposure to the techniques. For more information call Sue Tavitas 847-866-0870 or visit the company's Web site at [www.sawtooth.com](http://www.sawtooth.com).

The Analytical Group will hold its biannual WinCross and WinQuery software conference on March 18-20 at the Hilton Scottsdale Resort & Villas, Scottsdale, Ariz. For more information call 800-946-2767 or visit [www.acsinfo.com](http://www.acsinfo.com).

Upside Events, Inc. and Convergence Mediagroup will hold "project Y," a marketing summit that will analyze the behaviors, attitudes and motivations of today's youth culture, on March 19-21 on Treasure Island in San Francisco. For more information visit [www.projectY.net](http://www.projectY.net).

The European Society for Opinion and Marketing Research will hold a conference on global health care on April 1-3 in

Geneva, Switzerland. For more information visit [www.esomar.nl](http://www.esomar.nl).

Tragon Corporation will hold a workshop titled "Consumer Research Strategies for Brand Management" on April 3-4 at the Hyatt Rosemont, Rosemont, Ill. For more information call 800-841-1177 or visit [www.tragon.com](http://www.tragon.com).

Canada's Professional Marketing Research Society will hold its annual conference in Ottawa from April 23-25. For more information visit [www.pmrns-aprm.com](http://www.pmrns-aprm.com).

Anderson, Niebuhr & Associates will hold a workshop on questionnaire design and use on April 26-27 at the Holiday Inn Select - International Airport, Bloomington, Minn. For more information call 800-678-5577 or visit [www.ana-inc.com](http://www.ana-inc.com).

The Institute for International Research (IIR) will hold its International Market Research Forum on April 25-27 in Coral Gables, Fla. The speaker roster includes representatives from Procter & Gamble, Motorola, Lucent, Cisco Systems, UNISYS, Hallmark Cards, Hasbro and Pfizer. Registration for this conference includes registration for IIR's concurrent Multicultural Market Research Forum, which features panels on youth and urban markets and includes speakers from the Ford Motor Company, Blackplanet.com, the Center for the Study of International Migration at Georgetown University, and the U.S. Census. For more info visit [www.iir-ny.com](http://www.iir-ny.com) or call 888-670-8200.

The San Francisco Chapter of the American Marketing Association will hold a conference titled, "Qualitative Technology: 2000 and Beyond," on April 27 at the Crown Plaza Hotel Union Square, San Francisco. For more information visit [www.sfama.org](http://www.sfama.org) or call Jan Newman at 650-579-5590.

saying it "has elected not to proceed with the offering due to general market conditions and a determination that it would not be in the company's best interest to proceed at this time." The company was hoping to use the net proceeds to repay outstanding debt and for general corporate purposes and working capital. It had applied for a Nasdaq listing under the symbol GFOL and had hired Credit Suisse First Boston, Bear Stearns and Donaldson Lufkin & Jenrette to handle the IPO.

The assets and goodwill of London-based **Marketing Direction Limited** have been purchased from parent company Pensa Group (formerly Aspen Group) by **MDL Research Limited** for an undisclosed sum. MDL Research is a new holding company established by the existing Marketing Direction management team, Lise Cottle and Ricky Baxter, together with John Kelly, formerly chairman of Magenta — part of the MRSL Group, and Andy Booth, formerly research director of MSB (Managing the

Service Business). In the course of the purchase, MDL Research has taken over all existing employees and contracts. MDL Research Limited will also continue to trade as Marketing Direction and Media Marketing Direction. The members of the new management team are equal shareholders in the business. John Kelly has assumed the role of chairman and Lise Cottle that of company secretary.

San Francisco-based **Modalis Research Technologies, Inc.**, and the **International Webmasters Association (IWA)**, an association focused on educating and certifying Web professionals, have formed a strategic partnership for development and delivery of online information services. Modalis will provide IWA with instant surveys, syndicated reports, panels and other information services. IWA has agreed to provide Modalis with access to over 22,000 members for conducting industry-related research. To facilitate the research, the two organizations will build the Web

Profession Advisory Council (WPAC), a research panel which will provide insight into the products, services, compensation, and lifestyles of Web professionals.

On January 1, Minneapolis-based **Winona Research** began operating under the name **Research International USA** as a result of its merger with Research International USA.

**Jstreetdata.com Inc.**, a Washington, D.C., Web-based medical market research firm, has closed \$2.1 million in Series A financing. Investors include GreenSpring Ventures, ACI Korea, and Thorner Ventures.

Watertown, Mass.-based **Primix Solutions Inc.**, an Internet services firm, has completed the next generation Web site for QuickTake, a division of **Greenfield Online**. The site, designed by Primix and Greenfield

continued on p. 67

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# Data in many uses

*Statistics and power that you can  
afford from NCSS and PASS*

*Also, a new paper-based survey solution from SPSS*

By Steven Struhl

*Editor's note: Steven Struhl is senior vice president and senior methodologist at Total Research Corporation in Chicago. He can be reached at [smstruhl@aol.com](mailto:smstruhl@aol.com).*

One of the fascinating things about *Quirk's Data Use* columns (to this writer of them at least) is how many areas fall under this heading. Assuming that "data use" comprises, at the least, data collection and data analysis, we have an enormous field (or more accurately, set of fields) to cover. As many of us know firsthand, these fields still are fraught with difficulties at nearly every turn. We could spend plenty of time covering just a small sampling of the news related to ways in which you can use data better. Also, we could spend as much time - or more — covering areas that may not be news, but which nonetheless could be helpful to readers serious about their data.

The topics we will deal with in this article will illustrate the point that we indeed can follow many directions (likely no surprise to you alert readers). In fact, this review may have at least something for nearly everybody who needs to do some light to heavy analytical work. Specifically, we will cover these areas:

- We'll start with a program (called NCSS) that analyzes data and does much more at a price considerably lower than the major competitors.

- We'll then into an intriguing program (called PASS) that does "power analysis" from the same company, and discuss the concept of power analysis for those to whom this is not familiar.

- After having touched the edges of these two enormous areas (statistical packages and power analysis), we will conclude with a brief discussion of a new program from SPSS that promises to make the onerous task of creating paper-based questionnaires much easier.

### **NCSS: affordable statistics and power**

Because NCSS can be a really excellent introduction to serious data analysis, in this section we will cover some topics that, in earlier reviews, we assumed readers knew well. This way, if you are just starting to consider a statistics analysis program, you may find some material that will help you get grounded in this topic. Other readers still can benefit from the awful jokes that are sprinkled at various spots.

continued on p. 52



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# Fueling competition



*Surveys keep tabs on  
Washington Gas  
customers in wake  
of deregulation*

By Joseph Rydholm  
QMRR editor

**T**hough it seems outlandish now, it wasn't long ago that the words "lower price" and "natural gas" could be used in the same sentence.

Back in the good old days – last year, that is – before natural gas prices skyrocketed, the deregulation of energy markets was a viable, if unevenly successful, concept in many regions of the U.S.

The basic idea of deregulation is to open a market up and let competition work its price-lowering magic. The existing utility still owns the means of delivery and still administers the process, but additional suppliers are invited to enter the market and battle it out to meet consumers' needs, driving prices down and service quality up. That's the theory anyway. In practice, things are a little trickier. Unpredictable factors like the weather, production shortages, short-sighted public policy, and fluctuating demand can quickly derail the best-intentioned deregulation plans.

One region where it has worked encompasses the District of Columbia, Maryland, and Virginia, a market served by Washington, D.C.-based Washington Gas. In 1995, the company began offering some residential and commercial customers in Maryland the option of choosing a natural gas supplier other than Washington Gas. Similar programs were introduced in the District of Columbia and Virginia a few years later.

In 1998, Washington Gas chose Centrac DC, a Rockville, Md., research company, to conduct a multi-phase telephone survey. Interviews were conducted with customers in Maryland for three years, at the request of the Maryland Public Service Commission (PSC), which directed Washington Gas to survey

consumers and demonstrate, among other things, that awareness of the program was reaching customers of all income levels.

The research had four objectives:

- to assess the satisfaction of program participants;
- to determine why non-participants (who were aware of the program) didn't sign up for it;
- to explore differences between participants and non-participants; and
- to explore differences between participants and non-participants in the first, second, and third year of the program.

#### Started small

The Maryland program started small, but as more and more consumers signed up, Washington Gas went back to regulatory bodies for

approval to expand its reach. "We were given permission to start a pilot program to see how things went," says Sandy Holland, manager of the marketing research department at Washington Gas. "The first year that we offered a choice, only 6,000 people were eligible. Washington Gas had been a proponent of deregulation, so whenever we got near the ceiling [the maximum amount of customers that could participate], we would go to the Public Service Commission to request an increase. The research was used as a basis for justifying those increases, and to show that customers felt good about it."

For anyone who liked saving money, there was a lot to feel good about. The gas still flowed through Washington Gas lines, and

Washington Gas still read the meter and sent the bill, but consumers could choose an alternative, potentially lower-priced gas supplier (including Washington Gas Energy Services, a subsidiary of Washington Gas), and could sign up for a year-long contract to receive gas at a fixed price. (In the wake of the recent natural gas price fluctuations, many alternative suppliers have stopped offering fixed-price contracts.)

Telephone surveys were conducted with 200 Maryland participants in April 1999 and 200 non-participants in December 1998. (Initially, interviews were also conducted with consumers who had dropped the program but they were halted after it became clear that there was one main reason why people discontin-



## Washington Gas

ued the program: they had moved.)

"One of the things we tried to do with the research was to understand the differences between the people who were signing up and those who weren't," says Jeff Adler, president of Centrac DC. "The number one reason for not participating is a lack of motivation. Depending on size of a person's gas bill, the program could save them, say, \$35-\$40 dollars a year, which is worth the small effort it takes to sign up. For others, that might mean they have to get off the couch.

"Others feared that there would be some kind of billing mistake or other problem. And for some people, being able to choose their gas provider created tension. They would ask, 'What does this mean?'"

continued on p. 70

# The seven golden rules of styling/design research

By John S. Gongos

*Editor's note: John S. Gongos is president of Gongos and Associates, Inc., a Bloomfield Hills, Mich., research firm. He can be reached at [jgongos@gongos.com](mailto:jgongos@gongos.com).*

**A**fter seeing tremendous quality improvements in many products during the 1980s and 1990s, companies are finding it increasingly difficult to differentiate their offerings. Unable to do so through superior quality, many companies have turned to styling and design. Not only do you see a tremendous focus on styling/design in automobiles, boats and athletic shoes, but traditionally functional products such as personal computers, office products, appliances and golf clubs are now also turning to

styling to set themselves apart.

Marketing research has played a critical role in developing more creative and expressive designs in many of these industries. When conducted effectively, marketing research can provide valuable feedback that allows designers to maximize their creative talents for their customers. When not conducted effectively, it can stifle the designers' creativity and create conflict between designers and marketing management.

Knowing that marketing research can make or break the design process, we recommend that you follow our seven golden rules of styling research.

## 1. Front-load the research.

Many companies wait until they

have designs formulated, and then rely on research to sort out the good from the bad. Under this scenario, designers have little or no information to aid them when creating a new design and, as a result, have a much lower probability of connecting with the customer.

A more logical approach is to give the designer as much information about customers and their tastes prior to even beginning the design process. The following research steps can give the designers valuable insight early in the process and greatly increase the probability of connecting with the target market.

- Segmentation — determine the target market that the design is intended for.
- Gather product needs — under-



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stand the target market's functional requirements.

- Gather emotional needs — understand the emotional connections consumers have with the product and what excites them.

- Study their reactions to parallel products — understand what shapes and images in other products connect with their tastes

## 2. Avoid using research as a scorecard to pick the winner.

When research is used as a scorecard to critique a set of designs in order to pick a winner, designers quickly become defensive and many times ignore the research. The purpose of conducting research should not be to pick a winner, but rather to provide the most useful information to designers to help them finish the process with a winning design.

Designers are typically very talented and creative people (or they would not be in the position they are). As talented as they may be, however, they are not mind-readers (hence the need for research). A five-year-old's perceptions "fun" are probably different than those of the 38-year-old designer who is trying to design a fun-looking stapler for kids. A 45-year-old man living in Indiana whose first car was a '65 Mustang may have a different perception of what "retro" looks like (in a 2003 Mustang) than the young designer who lives in Los Angeles. A landscape company owner may have a different perception of what makes a piece of lawn equipment look rugged than a designer in the studio.

What research should do is align the designer's perceptions with those of his or her customer. By learning as much up front about the consumers and then observing their reactions to various styling alternatives, designers can create a knowledge base that allows them to see the product through their customers' eyes. At that point, they can use their creative talents in a direction that will connect

with their customers.

## 3. Don't rely only on qualitative research.

To avoid making the previous mistake (using research as a scorecard), a trend has developed among many companies to conduct only qualitative research. Designers tend to like this trend since their designs are not graded by the respondents. However, the research tends to be much less efficient if only qualitative data is gathered, providing less value for the money spent.

In most cases, the best strategy is to gather both quantitative and qualitative data.

The quantitative data should explain how respondents perceive the designs (i.e., modern, rugged, classy, functional, boring). The qualitative data should explain why they perceive it that way and what specifically (in the design) makes them feel that way.

The qualitative research is the key to developing a knowledge base that designers can utilize, not only in developing the current design, but also future design changes. If the designer already knows that pickup truck owners want a strong-looking truck, then the moderator can explore which shapes and lines give the perception of strength. By having quantitative data already gathered (and knowing which designs are perceived as being strong or weak), the moderator can be much more efficient in his or her quest to understand the whys and whats.

## 4. Don't rely only on quantitative research.

Relying only on quantitative data will also limit the usefulness of the research and has several drawbacks.

While the quantitative data will provide an accurate measure of respondents' perception of a design, it will not explain why respondents feel the way they do or what part of the design makes them feel that way.

As a result, if the designer wants to make an adjustment in an attempt to capture more “fun” in the stapler design, he or she really does not know where to start. At this point, it becomes trial and error, with a lot of wasted energy.

Quantitative data can tell you if a lawn mower design is perceived to be rugged, but it does not explain whether it is rugged in a positive sense or a negative sense. Qualitative probing helps explain which design cues are viewed positively and which are viewed negatively.

Relying only on quantitative data increases the probability that the research will be used as a scorecard rather than a learning tool for the designers.

### 5. Choose the comparative set wisely (context effect).

The comparison set in which a new design is tested has a strong effect on the overall acceptance of that design. This is particularly true when testing unique designs that are targeted to be styling leaders in the future. We refer to this phenomenon as the context effect and feel it should be seriously considered when developing the initial marketing research plan.

For example, if testing a futuristic and controversial pickup truck design that is targeted for 2003, you may get different results depending on whether respondents evaluate it along with three current pickup models versus testing it along with three other futuristic designs. Respondents feel much more comfortable viewing today’s designs and tend to react negatively to a design that is so different that it stands out. On the flip side, if all of the designs are different or unique, then respondents begin to think outside today’s context and focus on evaluating which of the different-looking designs they are attracted to.

In choosing the comparative set for the research study, researchers should consider the following:

- Include as many additional future designs as possible (rather than testing against only current products).
- Have a wide variety of designs that push the extremes (don’t test three designs that are similar, with only minor differences).
- Do not be afraid to include products outside the segment to stretch the limits or provide other futuristic designs.

### 6. Document the intended image of the design before you begin.

If the design team has followed Rule #1 (front-load the research), there should be an abundant amount of information about the target market prior to beginning the design process. At this point, you should know who the design is targeted toward, understand their needs and understand their tastes for other products.

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With this knowledge, the team should make some strategic decisions regarding the intended direction and image of the product prior to developing the design. Mapping out the desired image in the same words that you will be asking respondents to describe it (i.e., fun vs. serious, traditional vs. contemporary, luxurious vs. economical) will allow for valuable comparisons down the road.

When evaluating the research results among consumers, the team should now be looking at both the acceptance of the design and a comparison of the perceived image (among consumers) with the desired image (developed by design/marketing team).

#### **7. Don't believe respondents' first reaction (familiarity effect).**

How many times have you heard a respondent say at the end of a focus group, "Well, now that we've been talking about it for two hours, I think it's starting to grow on me." It is fairly normal for respondents to have a


negative first reaction to designs that are different or outside of their comfort zone. In many cases, as they become more familiar with the design, their overall opinion will improve in terms of appeal (we refer to this as the familiarity effect).

If the familiarity effect is accounted for effectively in the research design, ratings for future designs will either go up after multiple exposures or stay down after multiple exposures. It is not hard to decipher that designs with ratings that go up after multiple exposures are most likely the designs that will be well accepted in the future.

The danger of not taking into account the familiarity effect is a convergence on safe, boring designs that elicited positive initial reactions from respondents. Just because respondents have a negative first reaction to a design does not mean they will have a negative reaction to the design three years from now when they see it on the market every day. If Chrysler had listened to only

the first reactions of consumers when it was testing the design for its Dodge Ram pickup, it most likely would not have moved forward with that design. As soon as consumers became more comfortable with a truck design that was different, they began to see the many positive attributes of the design (strength, masculinity, power).

#### **Pay close attention**

There is a lot more to conducting styling research than asking respondents which design they prefer and why. If not designed properly, marketing research can actually stifle the design process rather than enhance it. The best way to enhance the design process is to pay close attention to the guidelines outlined here with the end goal being to align the designer's perceptions with that of his or her customer. Once the designer can see the product through the eyes of his or her customer their creative talents will blossom and winning designs will be soon to follow. 

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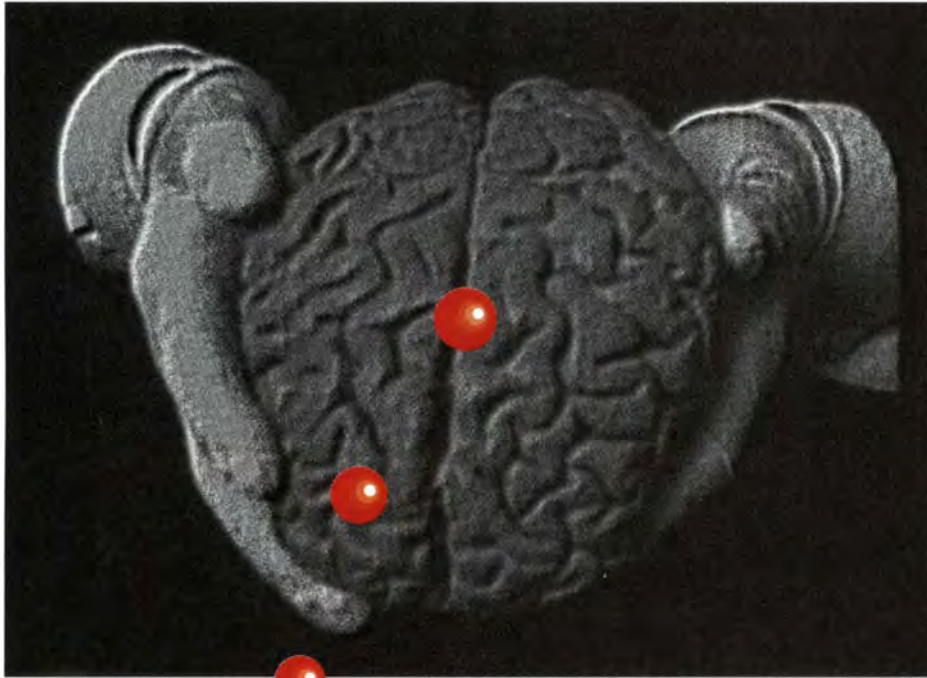
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# Where's the quality control?



By Howard Waddell

*Editor's note: Howard Waddell is president of Decision Resource, Inc., a Miami research firm. He can be reached at 305-666-0476 or at info@decisionresource.net.*

**T**he salesman at the dealership where I recently purchased a car told me that I would be receiving a call from "the home office" during which I would be asked about my overall experience with the dealership and about him in particular. "If you don't give me the highest marks..." he said, and he proceeded to draw his outstretched fingers across his throat, execution-style.

Only a few weeks later, a factory-authorized appliance repairman, after finishing his work at my home, said

I would be receiving a questionnaire in the mail about the service call. He said that getting the highest ratings was important to his career. I told him I would take care of him.

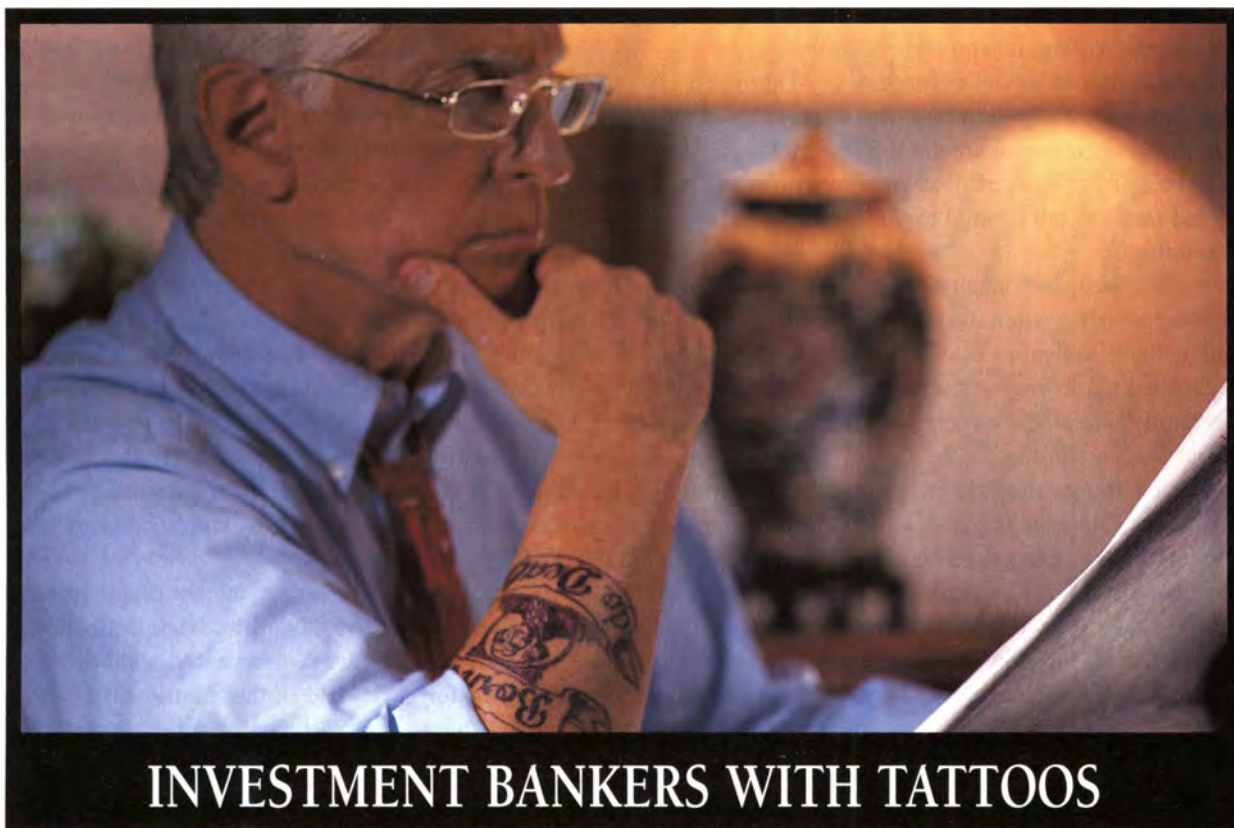
One of my clients, a senior executive at a local cruise line, once expressed some puzzlement about why past cruisers don't take cruises more often. He explained that surveys conducted among disembarking passengers showed that virtually everyone rated the cruise as superior in every way. It wasn't until I took a cruise myself in 1999 that I was able to shed some light on the issue.

Near the end of the cruise, there was a meeting in the ship's theater to explain to the passengers what they needed to know about U.S. customs

and immigration, tagging baggage, finding their baggage on the pier, and so on. The cruise director also explained that we would all receive a questionnaire about our cruise experience. He simply said that if we enjoyed the cruise, we should check off the highest ratings for each of the several attributes listed. Later in the day I spoke with our dining room tablemates and asked them how they rated the cruise on their questionnaires. They had followed the cruise director's instructions precisely.

## **Only wonder**

Based on the data that is being collected in the name of research, one can only wonder about the quality of the marketing decisions that are being



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made in the executive offices of corporate America. When senior managers are not fully aware of the true levels of customer service their businesses are providing, it is no surprise that good customer service is becoming increasingly difficult to find. But the problems of research are not limited to measuring customer satisfaction and they are not limited to poor methodology.

Too often, the questionnaires themselves are poorly written. It is apparent that there are more than a few professional market researchers who have totally unrealistic expectations of what people can remember about the routine things they do in their daily lives. Consider the following questions I have been asked on mail and telephone surveys. (And yes, I lie when asked if I work in the marketing research industry before the "real" questions begin. I know I am not alone in this regard.)

Question in a mail survey: *In the past three months, how much have you spent on movies you saw advertised in the newspaper?*

Did the researcher who wrote this question really believe people could provide anything other than a wild guess? Not only do I not know how much I spent in total on movies in the past three months, I certainly don't remember which of the movies were advertised where. (And, by the way, should I include tickets I bought for me alone or for me and my family?)

Question on a telephone survey: *Of your last 10 drinks of scotch, how many were at home? At a friend's? At a restaurant? At a bar or tavern? Elsewhere?*

Sorry, but my last 10 drinks of

scotch span a period of no less than two years and I'm afraid I neglected to fill out all the columns in my alcohol intake logbook. Scotch will do that.

There are also the merely dumb questions. In a recent telephone survey I was asked: Would you confirm your age? My response: Yes, of course. How old do you think I am?

Then there are the carelessly constructed questionnaires. One mail questionnaire I received presented a potential new product from a well-known consumer packaged goods manufacturer. After the product was described in some detail, a question asked about the likelihood that I would purchase the product. In my case the likelihood was low ("probably would not buy"). However, later in the questionnaire I was asked how I would use the product, when I would use it, and at what price I felt the product was so inexpensive that I would not purchase it because of quality concerns. One might think the author of the questionnaire had never heard of skip instructions.

And there are the questions that are written by people who are either very careless or who live lives that are very different from my own. I offer two examples from a mail panel questionnaire. I did not make these up.

Question: *How many times in an average day do you apply your usual underarm product? One to two times per day? Three to four times per day? Five to six times per day? More than six times per day?*

Question: *How many times in an average day do you shower/bathe? One time per day? Two times per day? Three times per day? Four times per day? Five or more times per day?*

I believe in good grooming but this is ridiculous.

There are also the problems associated with the task of data collection. During one phone survey, I was asked about my awareness of several companies in a particular industry. The industry was one with which I had little familiarity and I didn't recognize the first several company

names. Finally, I heard a name I knew but, before I could answer, the interviewer said to me, "Surely you've heard of *them!*" Talk about intimidating the respondent!

More recently, I was listening in on telephone interviews that were being conducted by a large phone center. To my dismay, the interviewer (who knew I was listening) was paraphrasing some of the questions.

### Variety of problems

We read from time to time the laments of corporate market researchers: they don't get the respect they feel they are due; or their research findings are not getting the attention they warrant. But given the frequency and variety of problems with survey methodology, questionnaire design, and data collection that I have seen recently (and I do not participate in that many surveys), I am not surprised that the research function in corporate America is not always held in high esteem.

So, what is the solution and how is it achieved? Clearly, part of the solution is to ensure that researchers have the necessary skills. First, those who are given the responsibility of writing questionnaires must have a superior command of the language. They must be able to write simply, clearly, and precisely. They must also be able to proofread.

Researchers must be able to place themselves in the role of the respondent when writing questionnaires. They must have the ability to comprehend how someone else might interpret the language they use in a questionnaire. They must be able to anticipate how people might respond to a question. They must understand the difference between a reasonable and an unreasonable question. They must understand what respondent fatigue is. Of course, questionnaires should be pre-tested even if only among others in the office.

Researchers must be able to anticipate what can invalidate their findings and take corrective action. How many car salesmen, appliance repair-



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men, and cruise directors are instructing customers how to complete survey questionnaires? If the risk of outside influence exists, it might not be unreasonable for the questionnaire to ask: "Has anyone in the [company] organization talked with you in any way about your possible answers to this questionnaire?" The questionnaires where the response is "yes" can either not be counted at all or segregated from all other responses in the data processing.

Researchers must be able to tell the CEO that the questions he or she wants to ask may not be good ones or will make the questionnaire too long. How often have we heard the phrase "As long as we're talking with these people...?"

Finally, there are the roles of the phone center and the mail-panel company. In the case of the questionnaire that asked about underarm products and bathing frequency, I had to ask myself if the project directors in this well-known mail-panel company blindly printed the questions their client provided to them. If they did, shame on them. And if phone centers don't review the questions before the interviewing starts, they should at least ensure that the questions are being read as written. Paraphrasing and editorializing by interviewers is not acceptable.

#### **Have an obligation**

We have all read about New Coke and other marketing gaffes that were the result of flawed marketing research. It would seem, though, that flawed research is not that uncommon. As members of a research community that is seeking greater recognition and appreciation, we have an obligation to our employers and our customers to provide the best market information that we can while not wasting money in the process. Ultimately, we must take personal responsibility for the quality of every research project we undertake. Those who take that responsibility seriously will themselves be taken seriously. 

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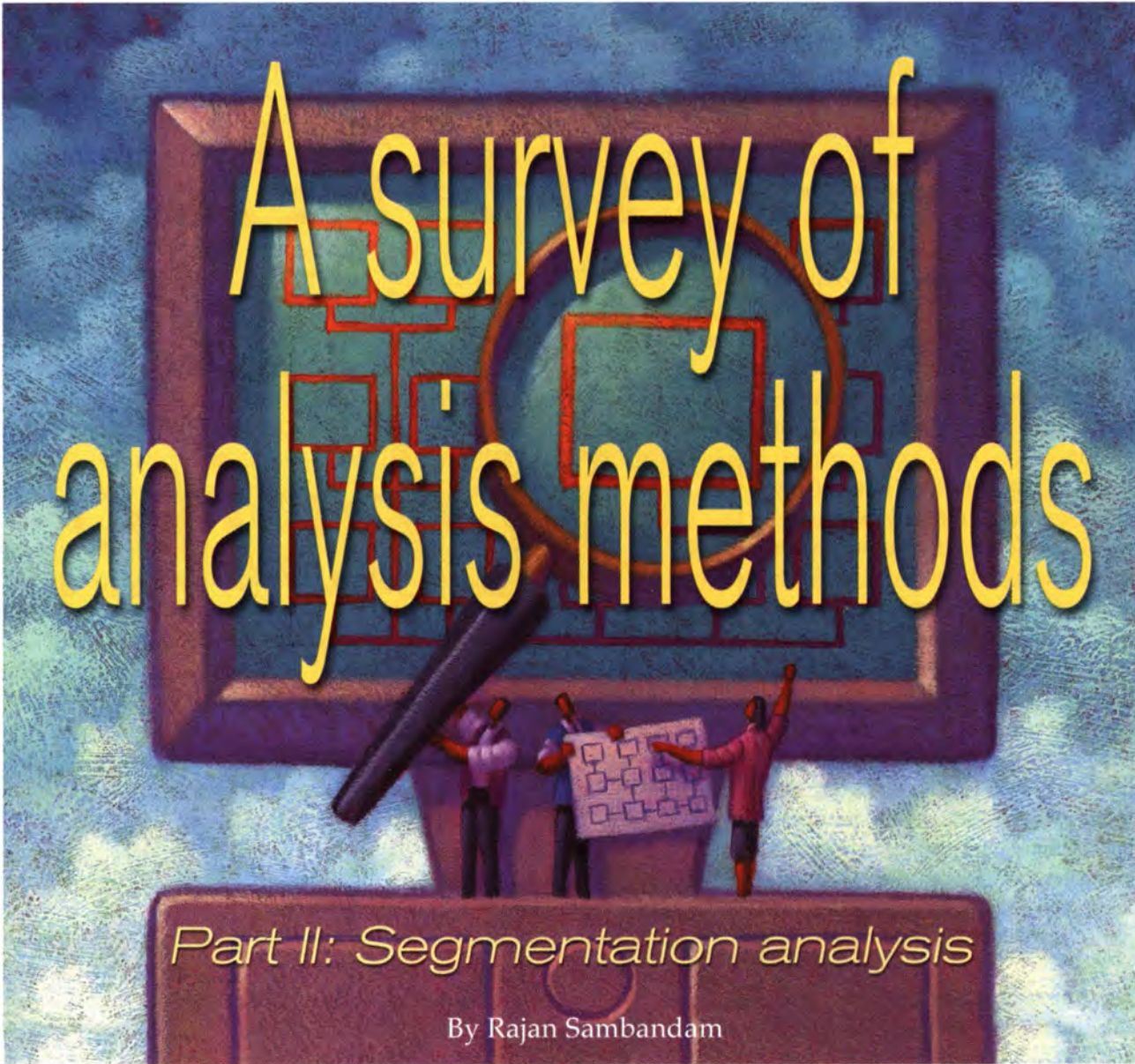
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# A survey of analysis methods

## Part II: Segmentation analysis

By Rajan Sambandam

*Editor's note: Rajan Sambandam is vice president/research at The Response Center, a Fort Washington, Pa., research firm. He can be reached at 215-641-2251 or at rsambandam@response-center.com. Part I of this survey of analysis methods appeared in the January issue.*

**S**egmentation analysis has been a part of marketing research for decades. It continues to be useful in a variety of different situations, even when the primary objective of the study is not segmentation. Since segmentation divides the data into comparative-

ly homogenous groups, marketing efforts such as targeting, positioning, retention and product development can be more efficiently performed. While the value of segmentation analysis is rarely questioned, the methods of developing segments have always given rise to considerable debate.

One of the simplest ways of segmenting the data is basic crosstabulation analysis. Respondents can be divided into, say, age or income groups and their differences studied across a variety of questions. This approach of pre-defining the respondent is often referred to as *a priori* segmentation.

Use of *a priori* segments, while attractive, is often not sufficient given the need to obtain complex segments based on multiple variables. Therefore, most of the time segments need to be developed after data have been collected. In this article we will consider various segmentation methods, both traditional and recent, that can be used to address marketing research problems. The three methods we will consider are: cluster analysis, neural networks and mixture models.

It should be noted at the outset that regardless of the method used for analysis, the quality of the segmentation



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scheme is determined by its usefulness to the manager. Even if the statistics indicate that a particular solution is the best one, if it is not useful to the manager then the segmentation analysis should be seen as a failure. This condition is not as harsh as it seems, because not only are many different solutions possible with a given set of variables, but changing the variable set can lead to more solutions. Further, using different analytical methods can also provide new solutions. Finally, there is also the option of dividing some of the segments obtained into sub-segments, if that would make them more actionable.

Next, we will look at each of the segmentation methods mentioned above and how they work. This will be followed by a discussion on ideas for developing good segments.

### Cluster analysis

Cluster analysis is the traditional method used for segmentation in marketing research. This is actually a family of methods that subsumes many variations and can be broadly classified under two distinct groups: hierarchical and non-hierarchical (or partitioning) methods.

Hierarchical clustering includes methods where the basic idea is to start with each observation as one cluster. Each observation is located on an  $n$ -dimensional space where  $n$  is the number of attributes used in the analysis. The distances between observations are measured using some form of distance metric such as Euclidean distance. Based on these distances, observations that are closest to one another are joined together to form a new cluster. This process continues until all observations have been merged into a single cluster. The optimal number of clusters can be determined by looking at standard measures of fit (statistics such as the cubic clustering criterion, pseudo- $f$  and pseudo- $t^2$ ) provided for each cluster solution.

Conversely, it is possible to start with all observations together as one cluster and work backwards until each observation becomes a cluster by itself. With both variants of the hierarchical method, the analyst will have to study the results of the analysis to determine the appro-

priate number of clusters.

In the non-hierarchical methods (such as  $k$ -means clustering), random observations are chosen as seeds (or cluster centers) for a pre-specified number of clusters. Thus, the initial ordering of the data can dictate the formation of clusters. Observations that are closest to a particular seed are assigned to that seed, thus giving rise to clusters. The analyst then obtains the fit statistics for a variety of solutions in order to determine the optimal number of clusters.

Choosing the appropriate number of clusters is never easy even with data sets that are reasonably well behaved. In commonly used methods like  $k$ -means clustering, the analyst needs to specify the number of clusters desired. This can be problematic, because the algorithm will assign observations to clusters regardless of whether there are bona fide segments in the data. The fit statistics that indicate the optimal number of clusters are often unclear. Sometimes the optimal number of clusters may not make operational sense. In such cases actionability should be considered before deciding on the optimal number of clusters. Hence, the process of developing segments from data using cluster analysis has a high interpretive content.

### Neural networks

Artificial neural networks are a recent addition to the variety of techniques used for data analysis. There are two basic types of neural networks: supervised learning and unsupervised learning networks. Supervised learning networks can be used in place of traditional methods like regression and discriminant analysis and were discussed in the previous article in this series. Unsupervised learning networks are the subject of our discussion here.

Unsupervised learning networks are generally used when there are no clear distinctions between dependent and independent variables in the data and when pattern or structure recognition is required. Since pattern recognition is really what is needed in segmentation analysis, unsupervised neural networks can be used for this purpose. The type of unsupervised learning network most appropriate for the problem of segmentation is the self-organizing map (SOM)



developed by Teuvo Kohonen.

### Self-organizing map

A typical SOM consists of an input layer and a grid-like structure known as the Kohonen layer. The input layer contains the variables that are going to be used in the analysis, while the Kohonen layer is a grid of processing elements. Each of the variables in the input layer is connected to each of the processing elements in the Kohonen layer. These connections have random starting weights attached to them before the start of the analysis.

When the information from the first respondent is presented to the network, the processing elements "compete" with each other. By mathematically combining the first respondent's score on each input variable with the weight of each connection, the processing element with the "winning" score can be determined. Winning implies that this particular processing element is the one that most closely resembles the input scores of the respondent. This processing element is called the "winner." The weights asso-

ciated with the winner will then be adjusted to more closely resemble the respondent. The network can be thought of as learning the response pattern of the respondent.

Not only are the weights associated with the winning processing element changed, but the weights of the neighboring processing elements are also changed. In other words an area of the grid is learning the response tendencies of the respondent.

When the second respondent's data are presented to the network the process is repeated. If the second respondent is similar to the first, then a processing element from the same area of the grid wins. Whether it is the same processing element as the last time will depend on whether the second respondent is exactly similar to the first one. If the second respondent is very different, then a processing element in a different part of the network will win.

At the end of this process the grid will show a two-dimensional representation of the data with different segments showing up as different neigh-

borhoods on the map. Because of the iterative process described above, substantial segments cannot be formed around outliers. This is a clear advantage this method enjoys over traditional k-means cluster analysis.

SOMs also have an advantage in that they were initially developed as not just a data-reduction tool, but also as a data visualization tool. This capability allows the SOM to provide a more intuitive understanding of the relationship between the variables and the segments, hence making the process of developing segments easier. However, some experts feel the reduction of a multidimensional problem to a two-dimensional space for visualization can actually be a disadvantage because of the constraints it may impose on the segmenting process. A further disadvantage in the case of large datasets is the amount of time required to run the analysis as compared to k-means cluster analysis.

### Mixture models

This is another broad category of segmentation methods. The basic idea

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linking methods in this category is that the data contain many distributions or segments which are mixed together. The task of the analysis then becomes one of unmixing the distributions and for this reason they are also called unmixing models.

One of the major differences between the cluster methods described previously and mixture models is the prior specification of the number of segments in the data. In non-hierarchical cluster analysis we have to explicitly specify the number of clusters in the data. In hierarchical cluster analysis the results are presented for every possible cluster solution (with the limit being each observation treated as a cluster), thus effectively making the analyst choose the optimal number of clusters. In mixture models, the assumption of underlying distributions allows the use of optimization approaches that can automatically identify the number of segments (distributions) in the data.

Another variation of the mixture

model approach to segmentation is known as latent segmentation analysis. While it belongs to the mixture model family, it has some advantages that might be very useful in a marketing research context. For example, latent segmentation analysis makes it possible to simultaneously conduct a segmentation and key driver analysis, where each segment can have its own unique key driver analysis. Thus if a manager is interested in not just identifying segments but also understanding the key drivers of, say, satisfaction within each segment, this would be an appropriate method to use. This process is more efficient than running a segmentation analysis first, followed by separate key driver runs for each segment.

While mixture models can be very useful in creating segments, they also have some disadvantages. The primary disadvantage is with the large amount of time required to run the analysis, especially when compared to k-means cluster analysis. There are also other disadvantages


such as sensitivity to the presence of outliers.

#### More than one method

While different types of approaches to segmentation analysis have been discussed here it is not clear that there is one approach that is the best in every situation. Segmentation analysis often involves trying more than one method to obtain the best result. The main reason for this is that unlike key driver analysis, segmentation analysis is quite unstructured. The final solution depends on the number and nature of variables included in the analysis. Changing even one variable can have a strong impact on the results. Without seeing the results, however, it is hard to identify the variables that can be useful in the analysis. This type of circular problem implies that the most important step in a segmentation analysis is the choice of variables to use. The more thought we put into selecting the variables, the more likely it is that the results will be useful.

There are a few other steps that can be taken (with any of the methods described here) to increase the chances of developing good segments. These are:

- eliminating outliers;
- using as few input variables as possible; and
- using input variables with low correlation between them.

Eliminating outliers not only ensures that segments don't center on them, they also result in tighter, better-defined segments. Using as few input variables as possible is hard to do, but very important for deriving useful and timely solutions. Beyond the fact that irrelevant variables can sabotage the analysis, using too many variables complicates the analysis, leading to solutions that are not useful. One way of reducing the number of input variables is to remove those that are highly correlated with other input variables. Further, since segmentation methods don't work as well when there is a collinearity problem in the input variable set, it makes sense to eliminate collinearity as much as possible. 

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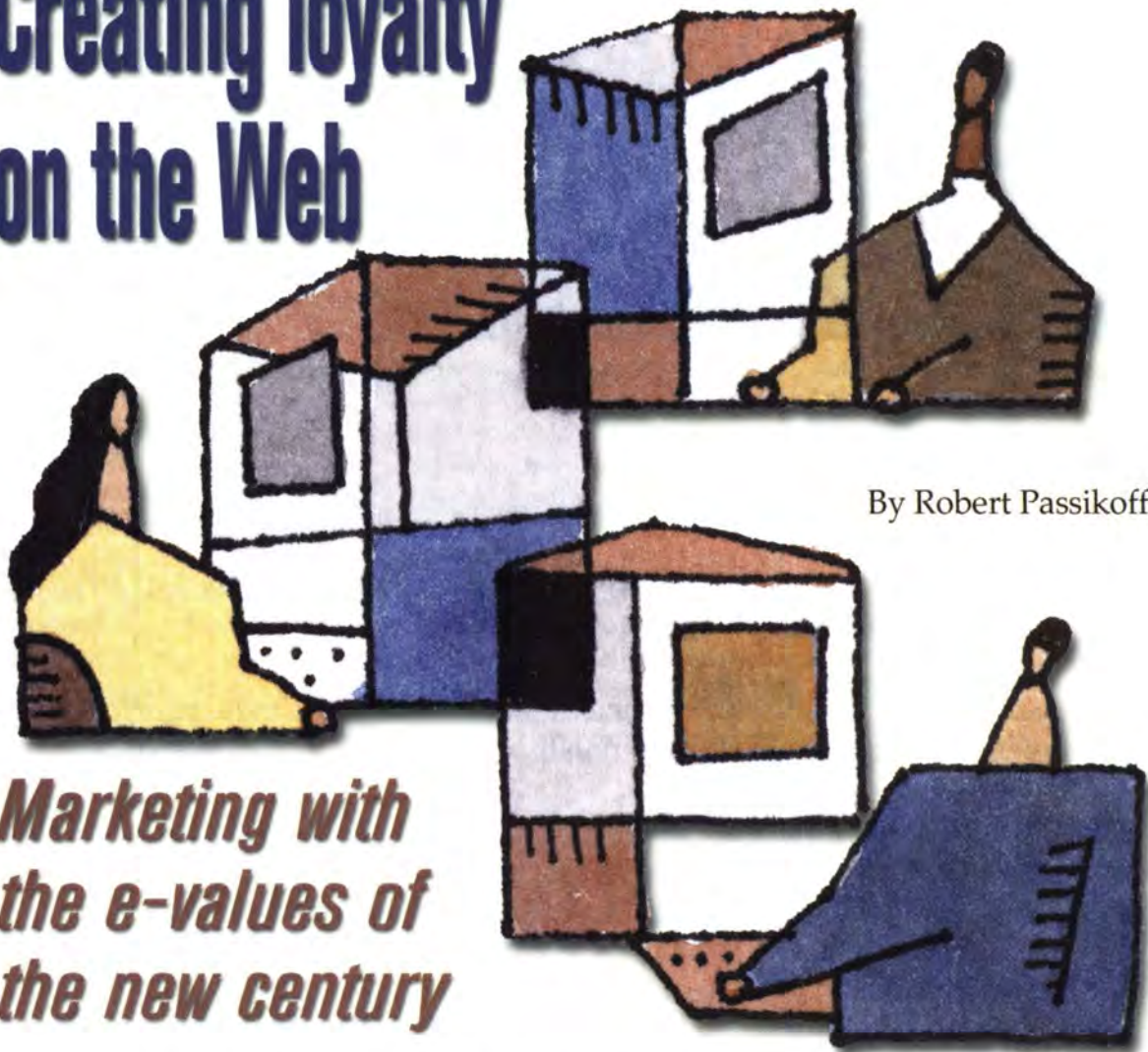
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# Creating loyalty on the Web



By Robert Passikoff

## *Marketing with the e-values of the new century*

*Editor's note: Robert Passikoff is president of Brand Keys, a New York research firm. He can be reached at 212-532-6028.*

**B**rands have long been with us, used as a means of distinguishing the goods of one provider from those of another. Their importance has grown in direct proportion to the acknowledgment that the primary capital of many businesses is their brands and the attendant brand equity and loyalty they engender.

The importance of brand equity has been compounded by the incontrovertible reality that as various economies (particularly that of the

United States) have matured, they have produced more savvy consumers, with access to near-immediate reserves of information, looking for new sorts of brand values.

These are values that often go well beyond the practical issues of functional product performance or rational product benefits, and further than the emotional and psychological aspects of brand personality and image. These deeper values must be factored into any definition and measurement of brand equity, especially if one is to use this measure as a means of assessing the return-on-investment (ROI) of loyalty programs. And if it is possible to redefine and measure brand equity in

this way, it will have profound implications about how 21st century marketers think about brands and branding, particularly for e-brands.

What will drive the success of e-commerce brands? After spectacular early success on Wall Street, Internet stocks are getting mixed — sometimes contradictory — reviews. Web companies' dynamic business models are admired, but their stock performance is hard to anticipate, and longer-term leading indicators — like customer loyalty — will become increasingly more important in predicting e-tail profitability.

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most especially, the search for customers, with many attempting to leverage loyalty programs to their best advantages. But how effective are these programs? Do they actually induce people to buy anything? Does their existence as part of the site experience ultimately contribute to building real customer loyalty?

Online booksellers have high-profile sales and share value despite their lack of profitability. The category leader is Amazon.com. Neither a bookshop nor a retail chain, Amazon exists only in cyberspace, its Web site listed by powerful marketing partners such as America Online, Yahoo!, Prodigy and other popular search engines.

With Amazon's dominance over Barnes & Noble.com and a howling pack of wannabes, the question emerges: Is there enough space for other online booksellers to prosper? The answer depends upon each brand and how loyal the customers of those brands will remain.

In order to thrive in the increasingly bustling e-marketplace a company must build a brand to which customers will be loyal — and profitable. And to do this a company must understand both the market and consumers' ever-changing values.

Amazon showed that it understood that the Internet was more than a high-speed cash register. It turns out it's a whole new way of connecting with customers — not a distribution channel but a community. And, like any community, it has certain key values that govern behavior. Early, early on Amazon asked such questions as: What's this new community like? What do members of the community want? What are their brand values, and which of those values do we share? Which loyalty programs — based upon these values — can we provide, beyond a fast, cheap way to buy stuff?

Research in the past decade has shown that measuring program effects on brand equity provides leading-indicator assessments from which successful marketing programs can be launched. One needs, however, to possess customer measures of the category purchase drivers, real levels of customer expectations about these drivers,

and an e-brand's core-brand equities. Needless to say, these must be identified in a manner that is based upon what customers think as opposed to what they say they think.

When e-brand loyalty efforts are measured in terms of how they affect, support and/or alter brand equity, the result is a leading-indicator measure of profitability. By calculating a value we call the loyalty multiple (the customer-loyalty version of a price/earnings ratio), any movement in actual loyalty levels can be easily spotted.

### Defining brand equity

The concept of brand equity has been defined a number of different ways for a number of different purposes. The highest-profile definitions have generally been provided by advertising agencies looking to differentiate products and services with layers of discriminators. Some of the coined terms which act as sometimes-interchangeable surrogates for brand equity include brand image, brand personality, assets, added-values, brand strength and so on.

Clearly, most of these definitions refer back to imagery and positioning. In other words, they are attempts at creating manifestations of a brand's equity — not a definition of brand equity. Talking about brand equity in those terms is easy. But if we define the central goal of strategic brand marketing and planning as the creation of an expanding pool of loyal customers, then, clearly, talk is cheap. If each conception of brand management (and its related advertising campaigns and marketing programs) yielded loyal customers, there would be a lot more loyal customers in the world.

We decided that a real definition was required that:

- 1) took account of the higher-order customer values which act as components that define the purchase drivers of the category;
- 2) captured the direction and velocity of customer values in the category;
- 3) provided real levels of customer expectation about category values and purchase drivers (unconstrained by current product offers in the category) reflecting what people really think as opposed to what they say they think;

and

4) was closely correlated with the market behavior and loyalties of the customer.

What we ended up with was this user-friendly definition: "Brand equity is the set of points where a brand exceeds customer expectations." Correctly measured, customer expectations identify how customer values and category values come together to form the dimensions of purchase, loyalty, and profitability. Correctly measured, customer expectations identify precisely "how high is up" to the customer. And, correctly measured, customer expectations provide a yardstick against which the brand, communications and attendant brand loyalty efforts can be measured. By this definition, brand equity is clearly the engine that drives customer loyalty, sales and profits.

#### Measuring e-brand equity

To measure brand equity (e- or otherwise) it is necessary to:

- accurately understand what drives a customer's decision to purchase one brand over another;
- accurately identify a brand's position among its competitors in the marketplace; and
- know what the customer segment is prepared to believe about the brand.

To provide such strategic intelligence, the selected research methodology must have the ability to:

- identify and compare brand equity;
- quantify levels of customer bonding to the category (and individual brands within the brand set); and
- provide a high correlation to actual market activity and sales.

Our firm has developed a proprietary measurement system needed to accomplish these project objectives. The theoretical framework upon which the system is based was shown to be most highly correlated with sales in the 1990 Advertising Research Foundation Copy Research Validity Project. The system is based upon established psychological theory, which holds that each consumer has psychological tendencies that determine their behavior in the marketplace. It's been termed "liking" or "bonding"; where liking or bonding levels are high, consumers are more likely to act favor-

ably to one brand over another.

In the marketing context, "acting favorably" toward something means liking it, preferring it, bonding to it, and actually buying it (and, in fact, buying it again), even in the face of tempting competitive price points. All of which sounds suspiciously like customer loyalty.

We also know that a customer measures a company or a product offering against a concept of their ideal. Whether customers do this explicitly or implic-

itly, it is inevitable. This ideal reference point, so critical in its influence or category behavior and choice, is called a lock. At any one time, any number of offerings in the market could have the potential to unlock the customer's ideal reference point. The challenge is to win sales and gain ground on the competition by finding or defining a set of values, or keys, that comes closest to opening the lock and forming the essential equity bond between customer and brand.

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Our research uses a psychological questionnaire which has a test/retest reliability of 93 percent (off a national probability sample in the U.S. and U.K.). Twenty questions are used employing personification as a device for gaining insights into the bonding/liking of a consumer for a category and a brand. The questionnaire asks the consumer/respondent to ascribe various attitudes and behaviors to the brand; it also asks how they would feel or behave if they were the brand itself. In their assessments of a brand (or a loyalty program for the brand), respondents are encouraged to

move beyond familiar dictated, sometimes-learned perceptions — like generally used product attributes and benefits — and into an arena of higher-order brand-based values.

Answers to the psychologically factor-loaded questions generate scores that yield a category/brand-specific picture in four category-driver dimensions which “describe” how the consumer views a category, compares brands in a category and, ultimately, buys in a category. In addition, the answers provide a measure of customer expectations for each of the four identified category drivers.

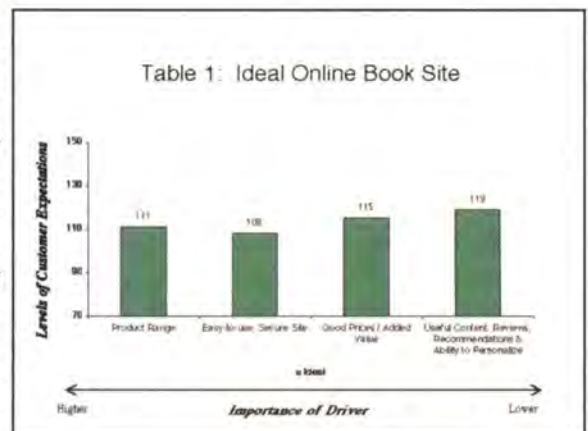
While certain features of our approach are proprietary, it is important to note that the overall methodology is a combination of established research techniques that are widely accepted in the professional research community, including factor and regression analyses and causal path mod-

eling.

### Calculating actual effects of e-loyalty for online books

The four category drivers for the online books category — derived from a customer-driven analysis of an extensive inventory of category and customer attributes, benefits, and values — have been identified as:

- product range;
- easy-to-use, secure site;



- good prices/added value;
- useful content — reviews, recommendations and ability to personalize.

The order of importance of the category drivers (read left to right) and customer expectations (expressed as a driver index or height of the bars) appear as shown in Table 1.

Per our definition, equity is defined as any point where the brand exceeded the customer ideal (at any level). That noted, for evaluations of brand strength and weakness, a difference of seven points is required for a significant difference at the 95 percent confidence level. The status of the two brands examined is shown in Table 2.

Interviews were conducted during the first quarter of 2000 among 306 respondents. Half were Amazon.com and half were Barnesandnoble.com customers. Respondents qualified for survey eligibility by having used one of the sites three or more times in the past quarter, thus establishing them as a customer of one site or the other. None of the respondents were aware of the loyalty program that was to be assessed.

As such, assessment variables included: the category ideal; the site (expressed as the brand Amazon.com or

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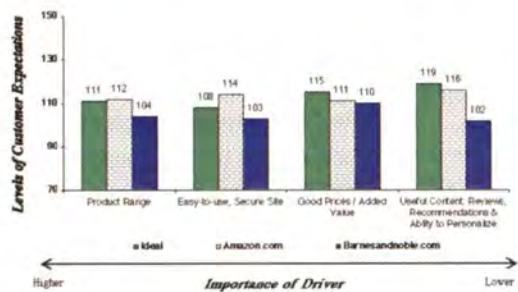
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Table 2: Online Book Brand Strength



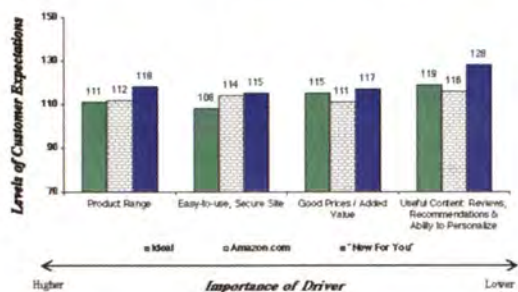
Barnes & Noble.com); and one loyalty program (for the site they assessed). The Amazon.com loyalty program is called "New For You," and provides customers the ability to create a personalized section of the Web site, and a vehicle for getting subscribers to view Amazon.com's semi-monthly e-mail of new recommendations for customers.

Clearly, this e-loyalty program directly reinforces e-values like "useful content" and "product range." (See Table 3.) One could argue that the act of having the customer personalize the site also increases involvement with the

or from B&N.com.

The B&N.com program is a vestige of last century's version of a loyalty program. If it resonates with any e-values at all, they are to be found in the "good prices/added value" driver, the one driver where B&N.com is actually competitive to Amazon — which is only the third-most-important driver. (See Table 4.)

Table 3: Amazon.com's "New For You" Effects on Brand Equity



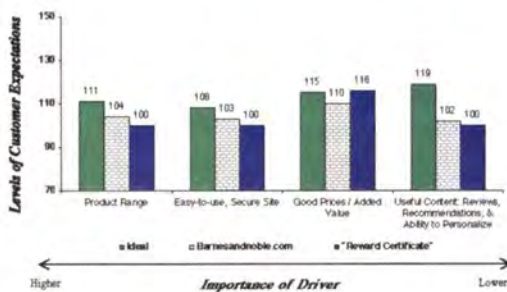
brand while resonating with "easy to use site" values.

Barnes & Noble.com's program is called "Barnes & Noble MasterCard Credit Card Reward Certificates." When customers use the credit card they earn points that can be redeemed for Reward Certificates are good at B&N bricks-and-mortar locations

— the site, or signed up for a credit card which they may or may not use.

Management wants to relate today's spending to today's returns, or tomorrow's or, at the very least, the next quarter's. The difficulty in answering these questions is that marketing and research managers are generally using or recommending systems that measure communications results based upon attitudinal or image change, not on financial returns to the organization as a result of the planned spending.

Table 4: Barnesandnoble.com's "Reward Certificate" Effects on Brand Equity



In theory and creative conception, both of these programs would seem to encourage customer loyalty — or at the very least continuity. But at the end of the day top management wants to know what return the organization will get back from such programs, not merely how many respondents may or may not have visited — and personalized

What is clear is that when you measure a loyalty effort's effect on brand equity, you have a leading-indicator measure of profitability. (And remember, the measure we're talking about is based upon the theoretical precept proved by the ARF to correlate most highly to sales.)

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assessments provide leading-indicator measures of profitability and, as such, a number of industry authorities have agreed that this reasoning may be extrapolated and applied by calculating the loyalty multiple.

The equation looks like this:

$$\text{Increase in Brand Equity/Loyalty Multiple} = \text{Current Brand Equity}$$

Evaluating the customer's non-transactional-but-highly-correlated-to-purchase (and re-purchase) reactions in this manner allows for a calculation of ROI based upon:

- overall effects upon brand equity;
- the effect upon one (or more) of the individual drivers of customer loyalty;
- the effect upon one (or more) of the individual value components which make up the drivers.

In the case at hand, the loyalty multiple is based on the change in brand equity resulting from the effects of each loyalty program. Table 5 shows the results.

According to the loyalty multiple for each brand, it is clear that Amazon.com's loyalty program better resonates with its customers. We recognize that many variables can cause a stock to rise and to fall. But for a single-brand company like Amazon.com and B&N.com (as opposed to a multiple-brand company such as General Motors or Proctor & Gamble) that is not involved in a merger or acquisition, is not caught in a long-

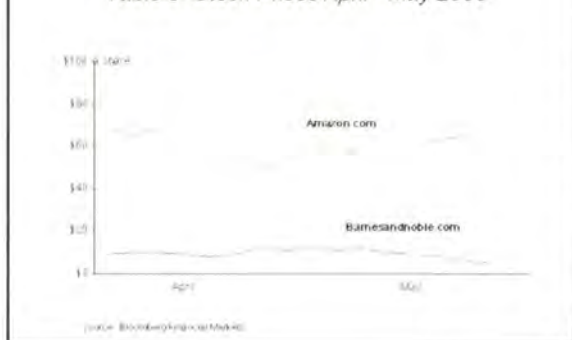
Table 5: Calculation of Loyalty Multiples

Amazon.com Loyalty Multiple	=	120 115	=	5%
Barnesandnoble.com Loyalty Multiple	=	106 104	=	0%

term sector updraft or downdraft, and is not speculating in rubles, the stock price is highly correlated to sales and, therefore, to brand loyalty.

Examining the direction and velocity of stock prices during April through June 2000 — the fiscal quarter following directly after our brand and loyalty programs assessments and analyses were made — confirms these brand

Table 6: Stock Prices April - May 2000



equity-based findings.

## Conclusions

Two years ago, after conducting a major survey of e-commerce customers for the Brand Keys Customer Loyalty Index, we published a list of the value drivers that were most important in stimulating e-commerce loyalty.

According to our research, e-companies that were perceived to embrace the values represented by these drivers were well positioned to build a loyal franchise and would, therefore, tend to be more profitable. We also noted that, interestingly, the values to which people responded in Internet retailers were quite different from those they sought in traditional retailers. This was true even for those traditional retailers who, with newly built

Web sites, were in the early stages of a clicks-and-mortar strategy.

And then, in the first quarter of 2000, our pronouncements smashed into their expiration date, and we discovered that the two sets of values are officially becoming one. According to our latest measures, customer values in the retail category are well on the way to becoming a mélange of

both e-values and traditional retail values.

Many of the values people once associated exclusively with bricks-and-mortar stores are now being sought online, while online values are permeating the non-virtual world. Retailers who miss or ignore this major tectonic shift in customer values do so at their own peril — especially when it comes to creating and marketing loyalty programs.

Barnes & Noble, despite its poor showing in the dot-com arena, recently started advertising that customers who place an online order by 11:00 a.m. can have their books delivered anywhere in Manhattan that same day. This is a pretty good example of the integration of some of the best values of both worlds — the speed and convenience of the Web coupled with the ability to hold the merchandise in your hand on the day of purchase. Whether it results in more loyal customer or increased profits

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remains to be seen.

What is clear, however, is that as the number of choices available to customers continues to proliferate, and the values customers embrace continue to evolve, retailers have an ever-growing need for a customer-loyalty strategy that includes a means of tracking and understanding the changes — not to mention the ability to quickly reshape their loyalty programs to reflect those changing values.

How do you stay on top of this changing world? Ask your customers. And how do you do that? As a company that has spent the past two decades honing a customer-listening system, we feel qualified to say that there's only one way to know what your customers are really thinking: the right kind of research. And we don't mean the rear-view mirror of satisfaction studies or static marketing research. We mean forward-looking research that accurately tracks the direction and velocity of customer values — and therefore is correlated with, and predictive of, customer loyalty and the profits that flow from such an economic

bond.

Coming to an agreement about how to define loyalty is relatively easy, especially in light of the near-universal acceptance of ROI valuations. Measurement — especially in the rapidly changing e-tail environment — is more complex. The problem is compounded by the fact that most evaluation tools currently employed do not provide accurate assessments of the ROI of the development and exposure costs of loyalty programs.

E-value/brand-equity-based assessment systems are powerful tools that enable marketers to capture actual customer values, then design e-loyalty programs that capitalize upon those values. As we have seen time after time, acting appropriately on this kind of research is a sure path to the holy grail of successful retail marketing, whether of the bricks, clicks, or mixed variety: a trusted brand with values and programs that result in loyal customers. **■**

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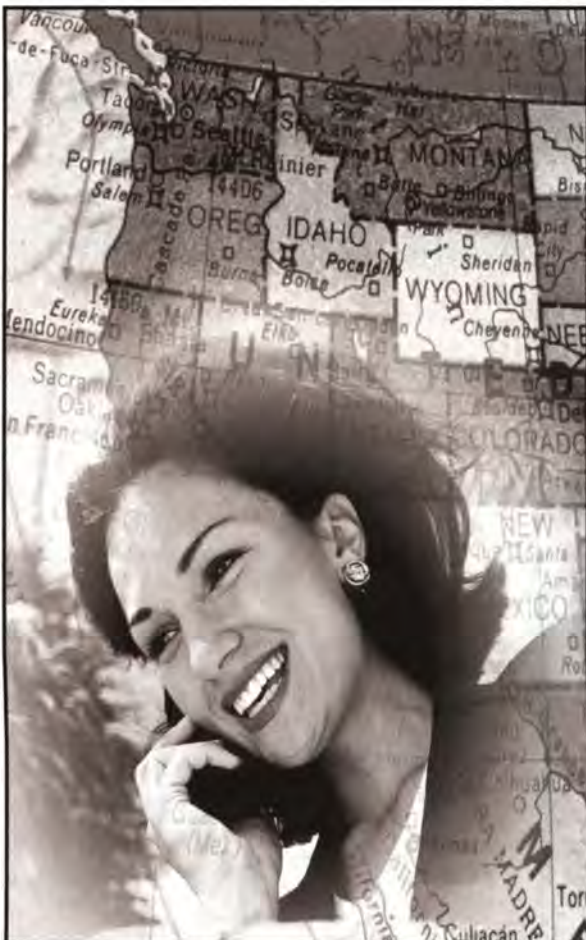
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# Supply on demand

Database facilitates supply chain approach to research project

By Andrew Adelson and Kevin O'Neill

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One of the hottest topics in the ever-changing world of e-business is supply chains. Supply chains are electronic links between a company and its vendors and customers. Using the Internet, buyers, sellers and even competitors work en

masse, trading excess inventory, capacity and tips. For example, supply chains are making strange bedfellows of GM, Ford and Chrysler. Several reputable analysts earmark these cyber-flea markets to do \$100 billion per year in business.

With the emergence of this great new opportunity, scores of companies are wondering how supply chains will develop in the coming years. For insights into this and other questions about supply chains, our firms – InterSight and Market Perspectives – jointly conducted a study, sponsored by more than 20 clients which combined 100 interviews of supply chain ambassadors plus a Web survey of these and a few hundred more.

Results will be in syndicated publication later this quarter.

At the outset of the project it dawned on us that research itself is a supply chain, and that we could apply the same concept to our study. So we created an approach to research that assembles and makes available information in a manner similar to a supply chain.

The research incorporated a specially designed relational database using automated procedures and dynamically-created Web pages which made the project faster, cheaper, better and, most importantly, possible. This project not only shed light on the next four years for supply chain vendors but also developed a

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new research methodology, one that we feel can be applied to similar challenges across many industries.

InterSight conducted telephone surveys and its staff recruited, interviewed and transcribed surveys from the clients' customers and prospects. Data was analyzed and distributed back to the clients.

Market Perspectives designed and implemented the database-driven surveying process that drove the project. Its repository not only holds data — text, numerical responses, phone numbers, e-mail addresses, etc. — but it also sent automatic e-mails to remind people to fill out their Web surveys, kept the project calendar and status current, and automated the process of creating analysis and intelligence from the study.

The idea for this approach to market research evolved from a three-year, three-part study by InterSight. In 1998 the firm conducted research on enterprise resource planning (ERP) systems. ERP is the catch-all term for a collection of computer systems that manage the back of an operation, such as automobile manufacturing and assembly. InterSight interviewed 63 IT managers at firms in industries from high-tech to automotive. It took 10 months to gather the research and write the final report. The 150-page tome was well-received but all participants agreed that it took too long and ran over budget.

For the next project, in 1999, the natural step was to examine customer relationship management (CRM). As its name indicates, CRM, in contrast to ERP, focuses on systems for managing a company's front-line processes. Companies including Seibel, Vantive and Broadvision sponsored the study, one identical in format to the ERP study. InterSight interviewed 60 industry leaders and joined forces with Market Perspectives, which ran a Web survey to add qualitative data to the information obtained from the interviews.

This project was about 20 percent faster and 20 percent better than the ERP one. It met the budget but not the

calendar, and still faced significant hurdles when combining data from the phone and Web sources. In addition, it was difficult to analyze data and write the final report.

### **The research methodology: the modus Interneti**

For all three projects, InterSight held one-hour, one-on-one expert interviews with early adopters. We crafted surveys designed to elicit rich commentary and anecdotes. We also collected a range of information such as company size, percent of sales conducted electronically, and a variety of ranking and importance scales.

The supply-chain research had several inherent problems beyond the mere size of the project. We wanted to combine two incongruous data types: 1) conversational questions with open-ended verbal responses and 2) multiple-choice questions with a finite number of usually-numerical answers. Our scope essentially doubled, growing from 60 to 100 phone interviews and adding hundreds of Web surveys. The challenge was compounded by the fact that the sponsoring clients live on Internet time and wanted the final report faster than ever before.

Applying the supply-chain concept, we set out to create a single database that would hold all information for the project, from respondents' contact information to the typed transcripts of their anecdotes. Next we mapped out all of the communications that would occur. For example, a recruiter sets an appointment for an interview and must send separate notices to the interviewer (a more senior person) and the interviewee, plus record the recruitment for tracking the project's progress. A password and ID needs to be generated and sent to both parties. Later, analysts and transcribers must be notified when the call is complete. (This is just a partial list of about 25 events that must be tracked and communicated for the project to flow smoothly.)

In practice, the database approach generates daily project management reports which e-mailed every morn-

ing. The first set of columns shows recruiting data, and can be entered manually or appended from a list. The second set of columns shows all interviewers their schedules chronologically, creating a project calendar. A tracking section allows management, and often the entire team, to see where it stands on all interviews. This can quickly generate customized reports to answer inquiries such as how many interviews have been transcribed.

The most important fields are those containing the data for analysis. This section shows the first of the answers to about 80 questions, which were the body of the survey. The database automatically provides all responses, crosstabs and frequencies. For example, we can immediately see how many people are piloting their supply chain, and drill down on the number of months expected for implementation to predict the penetration rate of the technology. Although built in a relational database structure, data is automatically downloaded to Microsoft Excel, SPSS, Word and Access for analysis.

In addition to holding all information for the project, the database also conducts most communications, most importantly a myriad of mundane yet necessary e-mails. It sends a customized note to participants, thanking them for volunteering, notifying them of appointments, giving a URL, password, ID and instructions for the Web survey and so on. Reminders are built-in. Even administrative assistants are alerted to set up conference bridges when necessary. Interviewers know before appointments if participants filled out their Web surveys and can remind them to do so. In short, countless thousands of e-mails, which used to take endless hours, disappeared from the analyst's to-do lists.

The database can also combine several methods of research such as phone and Web (as described here) plus focus groups, event (trade shows, conferences, etc.) intercept and more. Of course, it can be merged with existing databases and spread-

sheets. One client is beginning a survey on a CD-ROM with a telephone follow-up in which contributors can schedule interviews themselves. The CD and phone results will be merged, allowing a blend of qualitative and quantitative findings. This multimedia capability allows researchers to leverage the wealth of information stored in various data warehouses, ending up with a sum often greater than the parts.

Lastly, we were able to create multiple views into the database. The recruiter sees one screen with just contact information. Once enlisted, a participant sees a second set of pages with Web questions so they can do their homework. They can stop and return and the system even bookmarks their place. The telephone interviewer sees a third display of all questions in which the completed Web and blank phone questions are interwoven. While talking, the survey leader will see, for example, that a respondent has just implemented his supply chain and will soon start selling products but hasn't done so yet. Callers can then tailor questions to suit the circumstances, eliciting better responses.

#### Automated intelligence

The supply chain database transcends cyber-surveys, eclipsing the approach used for running the ERP and CRM studies. A million points of e-mail are part of the past. Can we use the modus Interneti to automate intelligence? Not entirely, but this system is a step toward that. We automated many steps in the analysis process. We reduced the research cycle from 10 months in 1998 to five months in 2000, despite the expanded scope. We stripped out most of the administrative work, dividing and conquering the workload to allow senior staff to concentrate on management and analysis while others took tasks such as transcribing.

For researchers, the supply chain method is useful for much smaller projects than the one described here. A single client can use it readily and several already are. It does not require

a large number of sponsors to create a critical mass or surpass a reasonable break-even. And, the methodology is applicable to any industry.

Some analysts dub 2000 as the "Internet 2.0" era. In Internet 1.0, from 1995 to 1999, it was important to get a Web site up and running and make e-mail commonplace. Since 2000 it has been critical to conduct business at the Web site, and to collaborate rather than just communicate. In the research world, the advent

of Web surveys has added another dimension to our repertoire, lending a new and meaningful mode of dialogue with respondents.

With Internet 2.0 we can expect to see greater degrees of interactivity and the combining of research techniques to further extend the capabilities of market research. While the technology itself is not the final answer, it can be a powerful tool in our efforts to better understand customers and markets. *TM*

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By Michael Lieberman

*Editor's note: Michael Lieberman is president of Multivariate Solutions, a New York research firm. He can be reached at 212-656-1711 or at michael@mvsolution.com.*

**Y**ou want a winner. Your company has just completed a study in which you sought to uncover the attribute or attributes among those you measured that best define your client's equity, usage drivers, or leading cause of switching to a competitor's brand. Your client needs to understand his market position, make strategic advertising decisions, or test the efficacy of a recent segmentation.

The challenge is to produce the

winner within the existing framework, without lengthening the questionnaire or raising costs.

Over the past few years, our company has been using with great success a simple yet sophisticated technique called key driver analysis. Key driver analysis utilizes linear regression, spread over given attributes or attitude statements and cut by key consumer groups, competitors, or varying markets. Key driver analysis gives a winner, or winners, and often tells a story that is valuable, easy to understand, and easier to present.

#### **The basics**

Key driver analysis measures the strength of descriptive attributes or performance ratings in relation to a

strategic characteristic. What is driving your brand in its market segment? What would make its market share rise? What makes your competitors' market share rise? Are they different? Why?

In regression analysis the strategic characteristic is called the dependent variable. The most unambiguous dependent variables are overall measures of a key aspect of your product's prestige. It could be overall performance, propensity to purchase the brand name, or probability (measured on a discrete scale) of switching carriers. The dependent variable is measured by an independent question from the ratings array, such as "would recommend to a friend," "overall satisfaction," "overall per-



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Having a wide variety of different kinds of products	0.10	0.12
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Having a strong reputation	0.17	0.04
Treating you like a valued customer	0.14	0.10
Having low fees and competitive packages	0.11	0.19
Having a wide variety of different kinds of products	0.11	0.17
Offering sound advice	0.11	0.22
<small>*Standard Area Indicates That Brand Attribute Beta is significant and influences Recommendation</small>		
Dependent Variable: Overall Customer Satisfaction		

Which Company Importance Ratings Are Most Highly Connected to Overall Customer Satisfaction		
Currently Use Company's Products	Standardized Coefficients	
Japan	Beta	Significance
Treating you like a valued customer	0.48	0.00
Having a strong reputation	0.13	0.04
Having low fees and competitive packages	0.08	0.20
Having a wide variety of different kinds of products	0.08	0.20
Having responsive customer service	0.05	0.54
Offering sound advice	0.04	0.49
<small>*Standard Area Indicates That Brand Attribute Beta is significant and influences Recommendation</small>		
Dependent Variable: Overall Customer Satisfaction		

Which Company Importance Ratings Are Most Highly Connected to Overall Customer Satisfaction		
Currently Use Company's Products	Standardized Coefficients	
Brazil	Beta	Significance
Having low fees and competitive packages	0.33	0.00
Having a wide variety of different kinds of products	0.25	0.00
Treating you like a valued customer	0.17	0.01
Having a strong reputation	0.14	0.17
Offering sound advice	0.08	0.23
Having responsive customer service	0.07	0.12
<small>*Standard Area Indicates That Brand Attribute Beta is significant and influences Recommendation</small>		
Dependent Variable: Overall Customer Satisfaction		

formance rating,” or “purchase intent.” These probes are directly connected to product performance and to market share. They tell you when the customer might switch to or from your client’s brand. They produce the “winner.”

Product attributes form the independent variables that drive the analysis. They can be performance ratings (Using a 1-to-10 scale how would you rate the bathrooms in this restaurant?), statements of satisfaction (Using a 1-to-7 scale how happy are you with your boss?), or agreements (Use a scale to indicate your level of agreement with the statement “This Web site is fun and entertaining,” etc.). In cases where the respondent is asked to rate a long list of attributes over several brands, the respondent can simply check a “yes,” indicating that the brand possesses this attribute. The corresponding data is coded 1/0. This, too, yields a statistically viable solution. The scales are different in the given examples to illustrate that key driver analysis is flexible and fits into most surveys in which key criteria are measured.

The last step is to know your “cuts.” In which market segment would you like to produce separate drivers? What makes key driver analysis efficient is that one can uti-

lize the same attributes (which then are only asked once on the questionnaire). The cuts are filters of key consumer groups, such as age, demographic, socioeconomic, or other segmentations. In a study where the respondent is asked to rate competitors on the same attribute range, each competitor is a separate equation. Even these can be filtered to compare differing competitor drivers among, say, consumers aged 18-35 or consumers with gross annual income above \$50,000 in the Midwest.

### Running the analysis

It is beyond the scope of this article to explain the theory of regression analysis in depth. However, below is the foundation on which the analysis is built.

Linear regression analysis uses ratings of independent variables and the corresponding ratings of the dependent variable to form a linear equation that predicts the dependent variable. The resulting equation yields beta scores, which are multiplied by the independent variables once the linear equation is formed. When one takes all the betas and multiplies them by their corresponding independent variables, it yields a predicted dependent variable that is similar to the overall rat-

ing the respondent gave in the actual survey.

The standardized beta scores are the statistic that sets the stage. They give the attribute strength of prediction regarding the dependent variable weighing all attributes. In other words, what moves the scores of your dependent variable up or down? Which attribute is key when people recommend your product or service to a friend?

After the regression has been run there are two steps to illuminate the results. The first is to rank the betas, setting the output with the attributes shown in order of importance as they relate to the dependent variable.

The next step is to highlight those betas that are statistically significant. In a nutshell, within each regression equation there is a basic assumption (called a null hypothesis) that the beta scores are equal to zero. In other words, they don’t matter. One column in the regression output is the P-value. Basically, the P-value is the chance that the null hypothesis is wrong. For example, for an attribute there is a P-value of .03. The interpretation is as follows. Subtract the P-value from 1 (1 - .03 = .97). This means there is a 97 percent chance that the null hypothesis is wrong, or that the beta is not zero. The lower the P-value, the stronger

the attribute. For key driver analysis, I usually draw the line at 90 percent, meaning that I want to be 90 percent sure the attribute beta means something.

### Output and interpretation

In the final output stage, we provide clients Excel spreadsheets — one for each key driver analysis — that clearly show the winners (they are ranked) and the important others (highlighted, significant attributes). It is common, also, for us to summarize the important attributes with accompanying beta scores within a report format, or as a PowerPoint file with the attributes shown in a horizontal bar chart indicating the relative strengths of their scores.

There are a few central themes when evaluating the final output. The first is to understand the number, or what the beta really means. Sometimes the “winning” beta is, say, .2. That is a rather small number for a winner. The second attribute, also significant, has a .1.

Still, the results are telling. The betas are to be interpreted as relative scores. For example, if “tastes good” is the top attribute with a score of .2, and “looks good” is second, significant, with a score of .1, the correct interpretation is that “tastes good” is twice as good a predictor as “looks good.”

The direct interpretation is as follows. According to our model, if the scores of “tastes good” rise, say 1 (from an average of 8.2 to 9.2 on a 10-point scale), we can expect the overall rating to rise .2.

### Promotion in four distinct markets

As an example, let’s look at a fictitious client, a consulting and business services firm that has performed the same survey in four of its 16 international markets. What it seeks to learn is how to promote its services according to the needs of its clients. Key driver analysis is chosen to illustrate the different brand equities among distinct yet

Market	Key Drivers
United States	Offering sound advice Having responsive customer service Having low fees and competitive packages
Japan	Treating you like a valued customer Having a strong reputation
Germany	Having responsive customer service Having a strong reputation
Brazil	Having low fees and competitive packages Having a wide variety of different kinds of product Treating you like a valued customer

important markets. The methodology is as described above. (Findings are shown in the charts on the facing page.) The imaginary respondents were asked to rate their importance preferences with regard to this company’s services. Later in the survey they were asked to rate their overall satisfaction with the company. Those measures together form the basis for our key driver analysis.

there are three attributes that drive the United States market. The analysis shows that American consumers of our simulated company’s services give equal credence to advice and customer service. They are strong attributes. A rise of one point in each results in a .25 rise in overall satisfaction. Half an indicator is “low fees and competitive services.” Our company sells quality in the U.S., and not at bargain-basement prices. Still, the analysis shows, there is competition. The remaining attributes are not significant and are not commented on in the final analysis.

In Japan, respect is paramount. “Treating you like a valued customer” is more than three times stronger than the only other key driver. Reputation is also important to Japanese customers.

In Germany, reputation and customer service are the two key drivers.

The Brazilian market is markedly dissimilar from the three others. In Brazil, competition for this company’s service falls along more traditional supply/demand lines. Price competitiveness and a wide range of

products will move performance higher. In addition, customer service shows up on the radar.

The chart above summarizes the four example markets and the key drivers within each.


The client is supposedly planning to use the research findings in its upcoming advertising and public relations campaign. In the United States I would recommend that it position the company as sharp and fast, giving value and good service for the money.

In advertisements in the Japanese market, the firm might want to portray its executives showing reverence to clients. In addition, tout the firm’s reputation for unblemished service and responsiveness.

In Germany, customer service and reputation are keys.

In Brazil, design a campaign that compares the company’s wide range of services and prices to competitors in other local markets. Show the company treating the client as a valued customer.

### Delivers a winner

The power and efficiency of the key driver analysis allow companies to capitalize on the existing drivers of their brands and to maximize brand equity. In the changing research market, when clients are searching for more information as well as cost effectiveness, key driver analysis delivers a winner in a way that the client can comprehend and utilize without delay. 

## Data Use

continued from p. 16

NCSS could be an excellent choice both for the beginning user and many with more advanced needs. Experience has shown that a highly diverse set of people need to analyze, squeeze, and make sense of batches of numbers. Skill levels range all the way from incredibly expert to, shall we say, quite modest. Users' budgets show almost as much variability — some people definitely need to find the most economical route to their answers, while others inherit such wonderfully costly items as complete "site licenses" to enormous analytical software suites.

If you lean more toward the first group, though, at least two salient problems are likely to confront you as you look into statistics programs. The first is surviving the sticker shock of pricing most major statistical programs. The other is a very real concern about whether the program will ever prove to be manageable — something that a human being could learn, live with, and put to good use on a regular basis.

### **Background on statistical and analytical packages, or, what's a bargain (you can skip this if you already know nearly everything)**

Most of us, I believe, would find it hard to name more than a few of the best-known packages that do heavy-duty statistical analysis. Many readers know about SAS and SPSS, and some doubtless are familiar with Systat and BMDP. However, there are over a dozen other packages which do some or many forms of advanced statistical processing. Aside from NCSS — the package that this portion of the article addresses — we can find many others including ABStat, CSS, EpiInfo, Kwikstat, Microstat, Minestat, PRO-DAS, Rats, Stata, Statistica, StatPac, and YStat. Then there are many, many other packages that cover just certain areas of analysis as well — and keeping up with these is even more difficult. For instance, we can find such packages as KnowledgeSeeker and CART (for classification tree analysis), Latent Gold (for latent class analysis), or

Limdep (for linear programming, the last time your author checked). (Please be sure to drop us a note if we omitted your favorite package.) These programs cover an incredible range of areas, basic styles of doing things — and prices.

With this in mind, your author will offer his own, perhaps idiosyncratic, method for classifying statistical analysis packages.

### **Over-the-top packages**

Starting at the high end, we have something usually called "enterprise class" software, which nearly always is truly, if not horribly, expensive. You can't find most of the programs in this class on lists like the one above, since they typically are rarified beasts that attack specific problems. Generally, these are scaled to run in very large computing environments, although some will fit on a mere PC. If you have a problem that one of these programs can address, chances are that a friendly sales representative has called on you, or you already have the item in question. For the rest of us, costs are hard to get in actual dollars, but we can safely say that they typically range from "more than you want to know about" to truly incredible.

Many of these programs do important things, and some more or less run on their own. For instance, if you ever had a telephone card number stolen by professionals, you may have encountered a hard-working program in the "over-the-top" class. As the calls to Somalia, and/or Zimbabwe and/or the South Pole start to accumulate rapidly in your account (assuming these are not places you normally call 50 times a day), the sharp-eyed software will detect an unusual call pattern, and shut down your card number. This requires a sophisticated form of artificial intelligence, and one incredibly heavy-duty piece of software to monitor all the calling activity going through the system. This exemplifies a very practical form of statistical analysis, then, but also a very specialized one which you will not find for sale at your local computer superstore.

### **The really big packages**

Returning to the analytical packages

you are somewhat likely to use, your author will hazard that the most extensive (and costly) is SAS. This package still seems to retain its long-running title as the biggest and most feature-laden of all general-purpose statistical software suites. If you devote enough of your life to SAS, you most likely can get it to do anything imaginable to a helpless set of numbers — if not a few things beyond the imaginable.

SAS, however, is available only by licensing. (There are several other packages that use this scheme, so please don't think we're singling SAS out for excessive review, or invective. SAS just has the unenviable position of being a relatively familiar example.) Licensing is a form of remuneration largely restricted to the software industry, although it won't be too unfamiliar to those of you with cable television — or for that matter, telephone service.

As the licensing system usually works, you pay a very large initial fee to obtain the honor of having a "license," and then fork over a merely large fee each year thereafter to continue using the software. If you do not pay your renewal fees, the software itself most often handles this problem by (as they say in the industry) "dropping dead." A key feature of most licensed software, then, is what's called a "drop dead date" — which is what it sounds like. If you don't pay on time, then one day the software just doesn't work any more. This has the highly desirable benefit to all software users of making sure the manufacturer gets a nice steady stream of revenues. As mentioned earlier, it's a lot like cable television.

### **Other statistics programs and the usual statistical software practice**

Most other statistics programs of at least moderate familiarity appear to follow the more usual software model — but often on a larger scale than usual. That is, they command initial purchase fees (robust more often than not), and then follow these by a stream of upgrades which you coincidentally also must purchase to stay current with all the latest and greatest features.

SPSS follows a somewhat more

complex variant of this plan, splitting its program into a "base" and "options." The base has a wide array of features, but most likely if you are serious about doing some in-depth analysis, this base will be missing a few routines that you need in your specific area. For instance, many of us interested in market research and marketing (or anyhow, working in either of those fields) would want the base and several "options" to meet the analytical demands placed upon us. Specifically, at least a few of us would feel ill-armed against a hostile world without at least the SPSS "Categories" module (to do correspondence analysis and other related forms of mapping), the "Professional Statistics" module (to do choice-based modeling), and the "Conjoint" module (to do, you guessed it, conjoint analysis). Those with an econometric bent most likely would want the "Trends" module, which has excellent time series analysis capabilities — and so on.

By the time you have put together the base and a few modules, your pur-

chase costs usually have gone well over four figures (of course, not counting the zeros after the decimal). Then, when upgrade time comes, it seems that you indeed will need to upgrade all the modules (or pieces) that you have grown to know and use, if not love.

Systat, billed as the scientific "alternative" statistical program to SPSS, comes all in one unit, and costs about \$1,200. When a new version comes out, you are encouraged to upgrade. The upgrade to Systat 10 (just released) costs users of Systat 9 about \$300. Information on other statistical programs is a bit harder to find, but most extant ones also seem to follow this type of model.

#### Serious power and serious decisions

By now, we hope all of you have noticed that the programs we've been discussing would require more of an investment — in both time and money — than most other types of PC-based programs that any of us ever would buy. Also, there can be no doubt that these programs are incredibly power-

ful and full-featured. Using just some of this power, the lucky user can do analyses which will pay for the purchase (or license) price many times over. We also should mention that the decisions in which these analyses figure often become truly momentous. To sum up what may already be obvious, then, making a good decision about one of these programs can make a big difference.

#### Enter NCSS

Still, some readers likely are still wondering if they can find some way to get serious and trustworthy analytical power — and a program that they actually can use — for a less formidable investment. Others may be just considering a statistics program, but are daunted by the high price of entry. NCSS is a program that will fill both needs amply. (NCSS is a wise abbreviation of the program's long moniker: "Number Cruncher Statistical System.") For roughly the last 20 years — extending all the way back to those primitive days of the DOS prompt and

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XT computers — NCSS, Inc. has (somewhat quietly) been building what is now a formidable statistical analysis package.

The newest version of NCSS (NCSS 2000) comes with a remarkable array of features, including many that cover advanced analyses — and as follows, quite a few features that you would not expect in anything but a very expensive piece of software.

Not to spoil our punch line, NCSS manages all this for \$300 (with documentation on the CD-ROM) or \$400 (with about 2,000 pages of nicely done large-format manuals).

### NCSS: what's inside the package

There are two basic aspects of a statistical analysis package that require some careful consideration. The first is how it treats you as a user. The second is the range and depth of the program's features — or what it will do for you, assuming you can figure out how to get it working.

### NCSS and how it treats the user

NCSS treats the user extremely well for a statistics program. "User friendliness" is one of those strange terms that did not exist before the advent of personal computers. Things either worked well and easily, or they didn't. Items in the first class usually were the good products, and their operation was more or less taken for granted — for instance, toasters. (Back in the good old days, early makers of "user-unfriendly" toasters simply went out of business.) Those objects in the second group were tolerated as long as they were useful, but often were roundly cursed as much as appreciated. Early automobiles are an example. (Actually, so are a lot of more recent automobiles.) If they worked, they were wonderful. When they decided not to, they were (you may pick your modifiers) contraptions.

Only with the entry of computers and software do we now have large classes of products that, ambiguously, may or may not work, or may or may not be possible to use and keep using. Early computers and programs tended to be quite unfriendly. If you go back far enough in the PC era, you too will recall when at least 80 percent of the

ID	VEHYR	GENDER	IMPCOM	IMPINT	IMPSAF	SAFRANK1	SAFRANK2	SAFRANK3
1	10	2000	2	0	50	50	2	1
2	17	2000	1	10	50	40	3	4
3	27	2000	2	33	33	34	5	3
4	32	2001	1	30	20	50	1	3
5	81	2000	1	10	30	60	3	1
6	155	2000	1	0	50	50	3	1
7	159	2000	1	30	30	40	1	2
8	183	2000	2	25	50	25	1	5
9	200	2000	2	30	30	40	5	2
10	211	2000	1	5	35	60	1	5
11	217	2000	1	30	25	45	1	3
12	240	2000	2	25	25	50	3	5
13	252	2000	1	15	35	50	4	1
14	261	2000		20	40	40	3	5
15	280	2000	2	10	40	50	5	1
16	296	2000	2	10	45	45	3	5
17	297	2000	1	0	25	75	3	1
18	317	2000	1	10	30	60	5	3
19	330	2000	2	10	30	60	1	3
20	351	2000	1	0	80	20	1	3
21	357	2000	1	0	50	50	1	3
22	439	2000	1	20	30	50	1	3

Figure 1: An opening NCSS screen resembles a data entry screen from Excel.

messages you got from your PC were, approximately, "ERROR ERROR ERROR."

Statistics programs, more than most, have tended to cling to the old "user unfriendly" paradigm. Many retained a basic "command-line" structure — where you type in the program's favorite syntax and hope that it runs — far into the Windows era. Some run this way still. (Others strike a sort of compromise, letting people choose from menus, point-and-click if they prefer, or type-in commands if that makes them feel better.) Even those with menu systems, button bars, and all the latest accoutrements can remain quite opaque in their operations to users less familiar with them.

NCSS has made quite a graceful transition to Windows, with the look and feel of a program that was actually designed for this environment. Taking a look at Figure 1, you can see that the opening screen looks something like a familiar data entry sheet from Excel. Those of you familiar with the more recent versions of SPSS will recognize the second tabbed sheet, which contains a description of the variables, including both their short names (eight characters or less) and their long labels.

### NCSS and value labels: a neat solution

The way in which NCSS handles value labels is somewhat different from SPSS, though, and quite elegant. (Value labels are the descriptive values that can be given to numerically coded variables. If you have a variable such as region, for instance, you might have number codes such as 1, 2, 3, 4 to stand for North, South, East, and West. You could then use the actual names as the value labels for the numeric codes. In the analyses you run, these value labels could appear either with or instead of the actual numeric codes. A crosstabulated table that showed the actual names of the regions, for instance, would be much easier to use than one which had only the number codes.)

In any event, what NCSS does with value labels is to put them into a spot in the data sheet. Let's say you specify that the value labels go in column 204. The program then looks at column 204 and, directly to the right, at column 205. The number codes should be in the left column (204) and the actual labels appear in the right column (205), something like the table below.

The elegant part of this is that any time you want to use these labels, you simply type into the appropriate spot

on the "variable info" tab that the value labels are found in column 204. Any number of variables can point to the same labels.

This becomes very handy as you add new variables that have the same value labels as ones you already have in the data set. You simply type into the "variable info" tab that the appropriate labels are in the same spot (for instance, column 204 again).

This also can be very nice if you want to change the labels for a large group of variables at one time. Any change in the labels that appear in column 205 will apply to all variables that share those labels simultaneously. Also, if you have questions about the labels, they are right on the sheet

C204	C205
1	North
2	South
3	East
4	West

in plain view. They are not hidden someplace inside the data structure as they are in many other statistics programs.

Overall this is quite a nice solution for labeling values, and likely to require less typing than others this writer has seen.

### NCSS help, hints and tips

Another thing that you may notice about NCSS, looking at Figure 1, is that it uses areas of the screen to give hints about what things are. For instance, toward the bottom, it reminds users that what they are looking at is the data entry screen. The program is extremely liberal in using hints, so that at most times there are on-screen reminders or pointers about what you are doing. Note in Figure 2 that the program is giving some very detailed pointers about what exactly

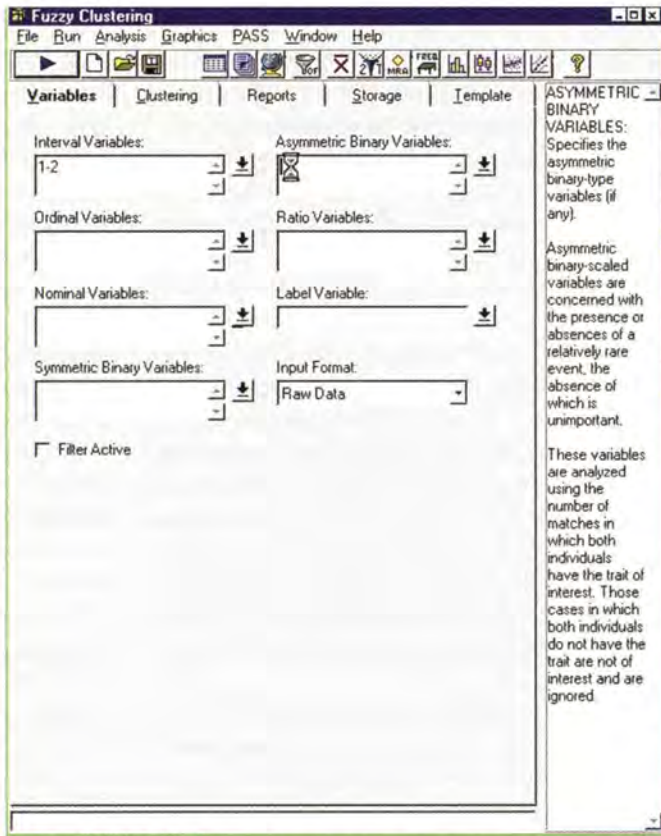


Figure 2: NCSS makes liberal use of on-screen reminders and pointers.

the type of variable highlighted is and what it can do in the analysis. If you are just a tad rusty about "fuzzy clustering," this type of information can be extremely helpful, and may even save you a reading session in the program's manual.

The only small area in which these

hints could be improved is that they sometimes are rather long, and tend to disappear as you move the cursor over to scroll down through them. Learning how to read the longer hints takes just a little practice, and perhaps a little forbearance in moving the mouse to the scroll bar.

### Getting the analysis out of the program

Another good feature of NCSS is its way of handling output, or the key analytical results. The program has a built-in word processor which keeps everything (charts and graphs included) in a document in RTF (rich text format), which nearly any word processing program can read and modify. This means that once you are done with NCSS, you do not

need to open the program again to read and use the results. (As a contrast, the standard output from SPSS, which officially is a ".spo" file, requires that you use SPSS or an accompanying SPSS output-reader program. However, on the positive

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side for SPSS, the “.spo” file is a “dynamic document,” which allows you to do things like flip the rows and columns in tables, manipulate charts, and so on.)

NCSS yields nicely formatted output, and can create very good-looking charts and graphs. If you are not satisfied with the way things look, you can use your word processing program to embellish at will. Using the RTF format, NCSS tables come into a word processing program as real tables, for instance, and then you can use the full power of Word, Word Pro, or Word Perfect (of whatever else you may have) to add looks or styles.

NCSS does not organize output in the way that will be familiar to SPSS users, with a sort of tree diagram in a separate window to the left that shows you where each portion of the analysis resides. (The SPSS tree diagram approach also allows you to move or delete entire sections of the output easily.) This is one area where SPSS seems to have a small edge. Since you can type at will into the NCSS word processor's output, though, and use search-and-replace to find and move whatever you wish, most users should find the NCSS approach more than adequate.

### **Data in and out**

The makers of NCSS have sensibly noticed that they do not live alone in the world, and so NCSS can import data from and export data to a wide range of programs. These include databases like Access, spreadsheets like Excel and Quattro, and statistics programs like SPSS, SAS and Systat. The only hitch your author found was that value labels did not make the transition from the other statistics programs to NCSS. This, then, would require some retyping — unless there is some special import routine that I missed.

### **Features and capabilities**

NCSS packs in an amazing number of features, especially for a program in its price range. This section will review the key ingredients in NCSS. As you may have noticed in Figure 2, NCSS includes some rather esoteric analytical methods, like fuzzy clustering. This

section of the review will by necessity read something like a catalogue, since we cannot hope that any of you would stay awake for a complete review of each feature. Rather, we hope that most of your responses will fall into the first of three relatively polite classes, namely (1) some careful reading followed by surprise at the number and extent of procedures included. We hope that only a small minority will fall into the other classes of somewhat polite response, namely (2) a smoldering feeling someplace behind the eyes followed by an outburst of indignation because a favorite method is missing, or (3) a shrug of the shoulders, perhaps followed by a feeling that “this is all a foreign language to me.” Still less polite responses are strictly discouraged.

NCSS, in any event, includes all the basic descriptive and nonparametric statistics you are likely to want. These include frequency distributions, tables of means and related univariate statistics, Chi-square tests, confidence limits, trimmed means, crosstabulation, Spearman's and Kendall's Tau correlations, Mantel-Haenszel tests, Fischer's exact tests, and assorted other nonparametric tests. The program also throws in, for good measure, calculators for probabilities and for areas under a curve. You also can get it to do linear programming for you.

The program's regression capabilities are particularly diverse, including several forms of regression intended to deal with the problems of multiple correlations among predictor variables (or as it is sometimes called, collinearity or multicollinearity) or “outliers” (extreme values) in the data. These include: all-possible search regression, principal components regression, robust regression and ridge regression.

NCSS also handles several relatively rarified procedures including: canonical correlation, response surface analysis, non-linear regression and proportional-hazards regression in addition to the old standby, stepwise linear regression. The program in fact has full-fledged general linear model (GLM) capabilities, which appears roughly on a par with what you will find in the leading statistics programs.

NCSS also can do logistic regression, both binomial and multi-value (or as it is more often called, multinomial). This means that you can, in theory, use NCSS to solve discrete choice analysis problems. However, you should be forewarned that the manuals give you no help in this area, not being geared specifically toward market research analysis. Given that McFadden has just shared in a Nobel prize (in economics) for his work on choice-based analysis, perhaps NCSS will consider including more discussion of this method, and examples showing how to apply its multi-value logistic regression capabilities toward this end.

In its methods for one-way analysis of variance (ANOVA), the program could perhaps offer a little more depth. While it has a large number of methods for comparing multiple means, it does not include (for instance) Tukey's Honest Significant Difference (HSD), which has emerged in research over the last few years as a good choice in many cases. Nor does it include some of the newer methods which do not make as many assumptions about the data (in particular, that the variances of the variables being compared are equal), such as Tamhane's T2, Dunnett's T3 and C, or the Games-Howell tests.

If you are shaking your head in bemusement now, let us assure you that relatively recent research has shown most tests of multiple means can break down if the variances (patterns of scattering) in the variables being compared are too different. In most practical applications, this is a relatively little-explored problem, but it is nice to have a statistical program that can address the issue should it arise. This probably is not a concern to most users, however, as informal observations suggest that the most widely used test of multiple means remains the good old Newman-Keuls (or its variant, the SNK) — which more recent research unfortunately has shown to be one of the least accurate means of doing multiple comparisons.

Beyond this slight limitation in test methods for one-way ANOVA, though, the program includes an impressive set



of MANOVA capabilities, and can do repeated measures analysis of variance. Again, it does not seem that many users avail themselves of these procedures, and at times it seems like hardly anybody understands MANOVA, either as an audience member or as a user, but the program should perform handsomely in these areas if you need it to do so.

The program also offers a very wide range of other methods which fall under the heading of multivariate analysis. These include:

- clustering - K means;
- clustering - various hierarchical methods;
- correspondence analysis;
- discriminant analysis;
- factor and principal components analysis;
- item analysis and item response analysis;
- loglinear models;
- multi-way tables;
- multidimensional scaling.

The correspondence analysis module is particularly nice. It produces nice scatter-diagrams with the row and column labels right next to the points, and with different symbols for the rows and the columns. It also allows you to add special rows of data that are not used in calculating the overall solution but that are plotted against it. This can be very helpful if you want to contrast data in a current analysis with data from some other analysis, without having the data from the second analysis influence the results. The charts paste nicely into PowerPoint, for instance, where you can nudge around any labels in an overcrowded diagram.

For those of you less familiar with correspondence analysis, we should point out this method can take any rectangular crosstabulated table of data, and turn it into a chart with one point for each column and one for each row. The proximities of the points to each other show their similarities. The distances of the points from the center of the chart show how "distinctive" or "average" each row or column is. This often is a tremendously useful means of visualizing data. For instance, a table with 10

columns and 12 rows would become a correspondence map with just 22 points on it. As we all should know by now, most audiences will quickly lose track of any table with more than three columns of numbers in it, so this method can prove most helpful in showing patterns that otherwise would become lost in a cloud of numbers.

### Still more features

The program also includes a quite respectable time series analysis, which can handle ARIMA/Box-Jenkins analysis, and also can do decomposition, exponential and smoothing models, harmonic analysis and spectral analysis. This is not quite as fancy as the SPSS Trends module, which includes both X-11 ARIMA and the ability to include leading indicators, but still could be all you need for most time series investigations. If you do time series analysis, these terms all should be quite familiar to you. If not, we can assure you that NCSS has an impressive list of capabilities in this area.

Another surprise is the depth and extent of this program's ability to do survival/reliability analyses. Again, this may reflect a slight bias toward the needs of those in engineering and the "hard sciences." However, should you ever need to do this form of analy-

sis, the program likely will have what you need, and enough descriptive information to help you make a good choice among its many methods. It can handle accelerated life tests, censoring of values (all types), exponential fitting, extreme-value fitting, the Kaplan-Meier method, lognormal fitting, log-rank tests, probit analysis, survival distributions, and Weibull analysis. This is quite a list of features — some of them even sent your reviewer back to his statistics books, just to make sure of what they are and what they do.

The program also can generate experimental designs. It does not have every design that has ever existed, but certainly has a wide range going beyond the fractional factorial (or Taguchi) designs that may be familiar to some of you from conjoint analysis. Should the situation arise, you can develop balanced incomplete block designs, Box-Behnken, central composite, Plackett-Burman and response surface designs. The program also has a D-optimal designs generator, so it definitely is keeping up with the latest fashions in the world of experimental design.

The program also ventures into the area of quality control analysis. Some of the terminology here also may seem a little unfamiliar, but should you wish to read about these methods, you might

## ***Scranks! Disqualified by the dudes at SurveyGuardian™!***

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**Klutch Swenson  
Disqualified Respondent #68**



well find some of them helpful — and even familiar (although you never quite knew this form of nomenclature for them). Anyhow, here is a brief run-down of some of the features you will find: Xbar-R charts, capability analysis, EWMA charts, moving average charts, Pareto charts, and R & R studies. (That last item is not “rest and relaxation,” which any of you who have read this far doubtless deserve. Rather it stands for “repeatability and reproducibility” study, and sometimes elsewhere is called a “gauge study.” These studies usually are done with analysis of production processes to determine if a particular measurement procedure is “adequate.” There is a lot more to this, but basically they are good for determining which part of “process variation” comes from a measurement procedure being used, and which part is due to the production process itself.)

### Plots and graphs

As mentioned earlier, NCSS does nicely at plotting and charting your data. It produces both old favorites and a few methods that may be new to most readers. A partial list of these would include: bar charts, box plots, contour plot, dot plots, error bar charts, histograms, percentile plots, pie charts, probability plots, ROC curves, scatter plots, scatter plot matrices, surface plots and even violin plots. (This latter is not a con-

be quite handy for dazzling a recalcitrant audience.) Figure 3 shows a selection of NCSS charts and graphs.

### An NCSS wish list

Although NCSS can generate the experimental designs that are generally used for conjoint analysis, it does not have a module that specifically handles the analysis itself. (If you are truly talented, you could manipulate the program into doing this, but then you probably would not be reading this review.) In any event, conjoint is not terribly difficult for a piece of software to do, so perhaps this is something the makers of NCSS could consider adding. Also, as mentioned earlier, some additional material in the section on multi-value (multinomial) logit, showing how this method can be used for discrete choice modeling, would be a strong addition.

Other items on the wish list are scattered. Aside from adding a few more test methods for one-way analysis of variance (ANOVA), these could just reflect your reviewer’s idiosyncrasies. For instance, the otherwise very strong discriminant analysis module does not allow for rotation of the discriminant coefficients or correlations. Rotating a discriminant solution has an effect something like rotating a factor analysis solution — that is, it tends to prevent most of the predictors from piling into the first function formed. Rotation does

ful maps. (Readers who are curious about discriminant-analysis based mapping can find an article on this in the Article Archive at the *Quirk’s* site [[www.quirks.com/articles/search.htm](http://www.quirks.com/articles/search.htm)] although it lacks the illustrations from the original magazine piece.) NCSS also is missing another of your reviewer’s favorites, discriminant “territorial maps,” which can both look nice and impress your audience. But again, these last items are more matters of preference than of need — and so we promise to spare you any others.

### The bottom line on NCSS

For the price asked, and indeed even for considerably more, you hardly can go wrong with NCSS. We strongly recommend that you splurge a little and spend the extra \$100 required to get the full set of manuals. You will find them clearly written, nicely laid out and produced, and full of helpful background and reference materials. The makers of NCSS even include a long section with annotated references, discussing their strengths and reasons for which they are recommended.

As mentioned earlier, you can get all the information in the manuals from the program’s CD-ROM in PDF format, which means you will need to get your hands on a (free from the Adobe Web site) Acrobat reader. NCSS always comes with a rather neatly named, large format book called “Quick Start and Self Help Manual,” which goes over the basics of running NCSS. You should find this extremely clear, with plenty of helpful screen shots and annotations, a real model of how to introduce a complex software program.

However, it is your reviewer’s considered judgment that you will like having the full set of manuals around, simply because it is easier to prop a book open and keep it on hand while you work than constantly to refer to a PDF document which most likely is buried a few screens down from where your analysis is taking place. Also, just to become annoyingly obvious (again), you cannot put flags or Post-its on select spots in PDF documents or write yourself little useful notes in their margins.

Overall, NCSS program could be an excellent starting point for those seek-

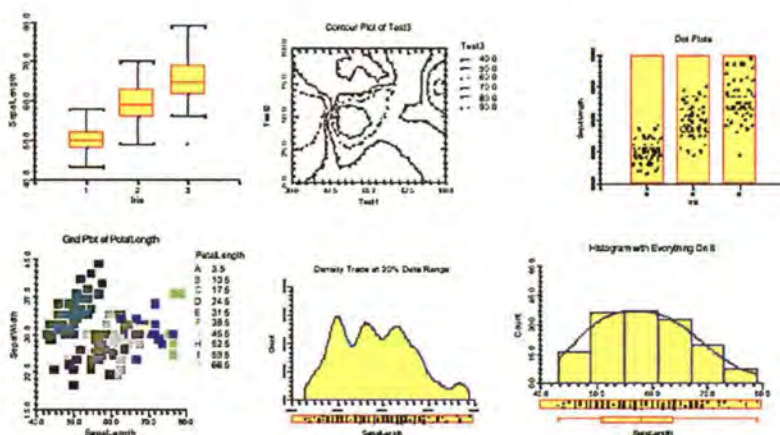


Figure 3: A sampling of NCSS charts and graphs.

spiracy among members of an orchestra, but rather a fairly technical-looking composite of two plots, that shows both an overall distribution, and details about its density at various places. This could

not change anything in the way the discriminant analysis predicts the groups in which people should belong, but if you are using discriminant analysis to do mapping, this can help make more use-

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Director of Fusion Marketing  
YAHOO!



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President - Chief Operating Officer  
and CEO Designate



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Jeffrey Mallett  
President and Chief Operating Officer



YAHOO!

Jeffrey Mallett, President and Chief Operating Officer, joined Yahoo! Inc. in 1995 as the executive responsible for establishing, operating and leading Yahoo!'s worldwide organization. As its president and chief operating officer, he is recognized as being instrumental in taking Yahoo! from a start-up to a pre-eminent global communications, commerce, and media company with 1999 annual net revenues of close to 600 million dollars. Mallett has a successful 15-year track record in the consumer multimedia, software and telecommunications industries.

### Tuesday Keynote Speaker

Peter R. Dolan  
President



BRISTOL-MYERS SQUIBB COMPANY

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ing an introduction to statistical analysis. Because of the program's wealth of features, it also could serve as an excellent addition to your analytical armamentarium, even if you already own one of the larger statistics packages.

### **PASS: statistical power analysis**

This is another program from the makers of NCSS, but with a slightly different goal. It does power analysis, which is the determination of how many respondents you will need to get results of some specified reliability. PASS does this with an amazing array of procedures, as we will discuss below.

Many of us are familiar with a relatively simple form of power analysis, namely, determining the sample size needed to reach a specified level of statistical confidence (such as 90 percent or 95 percent) with a sample proportion or percentage. In fact, for several years, one of the larger market research firms passed out nice cardboard devices (with either a sliding scale or a wheel you could rotate) that allowed you to do these calculations on the fly.

Real old-timers even could do these calculations with a slide-rule. For those of you who were not here in the exciting days before PCs, slide rules then were the ultimate in geek self-identification, especially if worn on the belt in their special leather cases designed just for that purpose. Slide rules contained several strangely labeled scales on each side, which you could slide by each other — and with enough practice, you could get pretty accurate answers for all sorts of strange calculations from them. Also, the best ones came from Germany — the former bastion of scientific precision — and cost far more than a powerful calculator does today.

Even with a Pentium IV humming in front of you, power analysis for other statistical methods requires some reading and thinking if you are not familiar with it. For most methods of power analysis, you also will need to make some assumptions about the patterns of scattering (or variance) in your data. Of course, you can make multiple sets of assumptions and see what sample size each one requires — which usually has been part of the power analyses your author has seen. Power analysis, as gen-

erally applied, lets you ask and many what-if type questions. PASS lets you ask many questions, as it can solve for power, sample size, effect size, and alpha level.

As your work becomes more “official,” power analysis seems to become more important. Many government agencies require power analysis before approving any research project. I would suspect that before too long more corporations of the highly serious (or pretentious) type will start asking for it as well.

The number of procedures that this program works with is almost mind numbing. For instance, among its analysis of variance procedures you can do power calculations for: factorial analysis of variance (AOV), fixed effects AOV, Geiser-Greenhouse, one-way AOV, planned comparisons, randomized block AOV, and repeated measures AOV.

Among the types of regression and correlation this program can handle are not only linear regression and simple correlations, but also logistic regression (binomial and normal) and intraclass correlation.

Along with power analyses that may be more familiar with proportions and t-tests (such as determining confidence intervals around a proportion, or comparing two proportions), PASS includes power analysis for a wide range of related procedures. This list is so comprehensive that some of these likely will be unfamiliar to most readers. Nonetheless, here are some of them: group sequential proportions, Simon's two-stage designs, cluster randomization, Mann-Whitney tests, and Wilcoxon tests.

The program also can do power analysis for a wide range of survival analysis methods, which include: Logrank survival (simple and advanced), group sequential survival analysis and post-marketing surveillance analysis. I would suggest that you don't feel too concerned if these are not familiar to you (not that you are worried), as these are, for the moment, applied more often to scientific studies and studies of industrial processes than to analyses related to marketing or market research. However, it would not surprise your reviewer too much if certain

organizations started demanding these types of power analysis before spending their hard-won money (or for that matter, ill-won money) on research projects.

The program is indeed very up to date in the power analysis applications it has available (certainly, more so than your humble reviewer). It now includes a set of analytical methods for group sequential tests, with such “cutting-edge” topics as alpha spending functions using the Lan-DeMets approach. Finding out what this is and how it is used at the very least will promise that, in the right circles, you will sound impressive — or at least obscure (which often comes to the same thing).

Perhaps best of all, PASS comes with a 490-page manual that contains tutorials, examples, annotated output, references, formulas, verification, and complete instructions on each procedure. It seems safe to say that it does as much as is possible to make power analysis approachable, and even possible, for many users. Mostly you need to fill in the appropriate boxes in rather nicely constructed screen dialogues — although as Figure 4 suggests, you may have a lot of concerns to address, and understand, while doing your analysis. Also fortunately for most users, the program automatically creates appropriate tables and charts of the results. It generates text summaries in a “portable” format that you can easily cut and paste using any word processor. This, of course, means you can easily include the required results in your proposal.

### **PASS overall**

Your reviewer is not aware of any other program that can calculate required sample sizes and power for as many different statistical procedures as does PASS. For a relatively modest outlay (\$250), PASS will provide you with all the power analysis you are ever likely to need. If you are new to this area of statistical analysis, it will provide an excellent introduction, and should help you get up to speed when you need to know something about statistical power.

### **The new mrPaper program and the “Paper Solution” from SPSS**

With all this power (both statistical

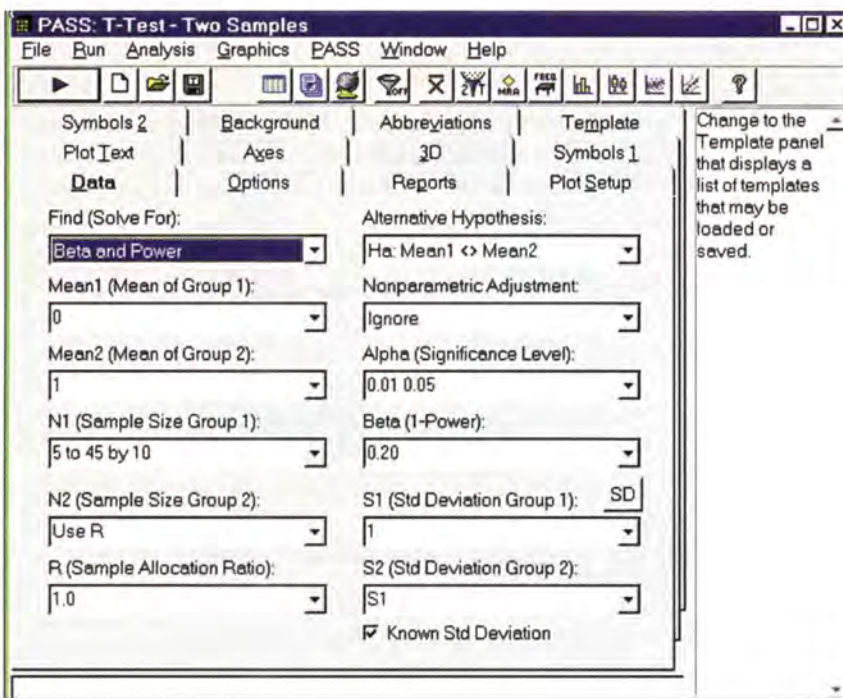


Figure 4: PASS uses a series of screen dialogues to structure the analysis function.

and of the power analysis variety) available at a relatively modest cost, it is not surprising to see the larger players in this software arena branching out into related areas. With some luck, we are just starting to see more applications that prove to be both new and useful.

SPSS has focused particularly on market research, and now has a group (or division, or section of the company) identified specifically as SPSSmr (for "market research"). Your author recently had an opportunity to see a long interactive demonstration of a new product from SPSS intended to simplify the process of creating and revising paper-based surveys. SPSS calls this product "mrPaper." I also had a glimpse at another product that works along with this one, and which appears to make it much easier to translate surveys. Perhaps unsurprisingly, this is called "mrTranslate," and we will discuss this along with several companion programs briefly toward the end of the review.

As a small caveat, I need to say that while I saw a lengthy demonstration, and had the chance to ask as many questions as I could muster, I did not spend time using a real working version of the mrPaper product. This means that I cannot make any semi-intelligent comments about the performance of this product under fire, or when it is being tortured or abused. This program is so

intriguing, though, that I am bending a long-standing rule (self-imposed) of never writing about a program until I have given a full working version a stiff workout. (We can, though, at least promise that no software was harmed in the creation of this section of the review.)

The mrPaper program neatly addresses the problems that arise in the creation of nearly all paper questionnaires, namely the formatting of complex questions and dealing with revisions. The program uses a so-called "questionnaire authoring" tool (either Quanquest or In2form), along with a set of additions and modifications to Microsoft Word, to allow incredible flexibility in creating and modifying questions. The program adds a set of "question looks" to the Microsoft Word set of paragraph styles. However, "looks" are more detailed than paragraph styles, specifying the entire set-up and appearance of a given question type. For instance, if you want all long lists to appear in two columns, you can specify the exact spacing, where the columns start after the main body of the question, whether check boxes or numbers appear, and so on. If you later decide that you want the question to appear as three columns, it only takes a click of a mouse button to make the transformation. Anybody who ever has tried to do this type of reformatting

by hand can understand how much work this can save.

The use of "question looks" also ensures consistency in formatting, no matter who works on the questionnaire. These "looks" can be gathered into broader themes, so that you can (for instance) have one type of formatting for one client and still a different type of formatting for another. This seems like a nearly ideal solution for dealing with more than one pesky person who wants to have everything in a questionnaire "just so."

Perhaps the cleverest feature of the mrPaper product is that it keeps all the information about the questions in the questionnaire in a centralized location that is not a part of the document. SPSS calls this "meta-data." The practical importance of this is that you can insert or move questions and the program will automatically change the numbering of all questions accordingly. (With mrPaper, you may never have to see anything like "Q6a.2b" in the numbering of your questions again.) The centralized meta-data file keeps track of everything for you over the course of as many revisions as you need to make. It was amazing the watch how questions and formatting effortlessly flowed into place after revisions, guided by mrPaper.

The mrPaper program also links into several other programs that SPSS offers. As mentioned earlier, the mrPaper program works with another module called mrTranslate. Here the use of the "meta-data" approach and "question looks" attains great power. Translators only have to worry about translating the key phrases and terms used in the questionnaire. This occurs outside the translated questionnaire that will appear in the new language. Once the appropriate wording has been translated, mrPaper lays out the questions and formats the questionnaire in the other language automatically.

If revisions get made to the main, English-language questionnaire, such as adding questions, placeholders for these are reserved in the foreign language version, and again all the translators need to do is provide the appropriate translation terms. Any moving or reformatting of questions in the main

(English-language) questionnaire is immediately reflected in the translated versions. Everything is kept in neat order by the program.

If you wish to scan questions, mrPaper will work with still another program, called mrScan. This program again relies heavily on the “meta-data” that resides outside the questionnaire. It quickly goes through the questionnaire and identifies (by a process that looks like an optical character recognition program in action) where all the questions and answers are. It also can encode each questionnaire with a unique ID number and put the “scanning marks” on the questionnaire that are needed to align each page properly as it goes into the scanner. Obviously, you will need a fairly high-quality sheet-feeding scanner to use this program’s full capabilities.

How the various programs fit together is summarized in Figure 5. Here I have taken the liberty of simplifying and annotating a diagram from SPSS. This figure shows only the way in which mrPaper would work with other programs to handle scanned documents — which requires more software than a standard key-punched paper questionnaire. With apologies to SPSS for defacing their beautiful original artwork, then, and with hopes that this simplifies matters, I refer you to the flowchart shown in Figure 5.

The mrPaper program along with Quanquest (which you also need) costs \$3,650 for one copy of both for one year. SPSS also strongly encourages that you send one or more people to two training sessions (one for mrPaper and one for Quanquest) before using the product. This would cost \$3,600 if you have it done on-site. The cost would be substantially less — as little as \$1,200 — if you can go to an SPSS training facility.

It seems that this program would, with any reasonable volume of questionnaires, more than pay for itself in time and effort saved — or as the catch phrase goes, in “increased productivity.” At the very least, it should save much of the aggravation that seems to accompany the evolution of nearly every paper-based questionnaire. It is a very intriguing product that looks well

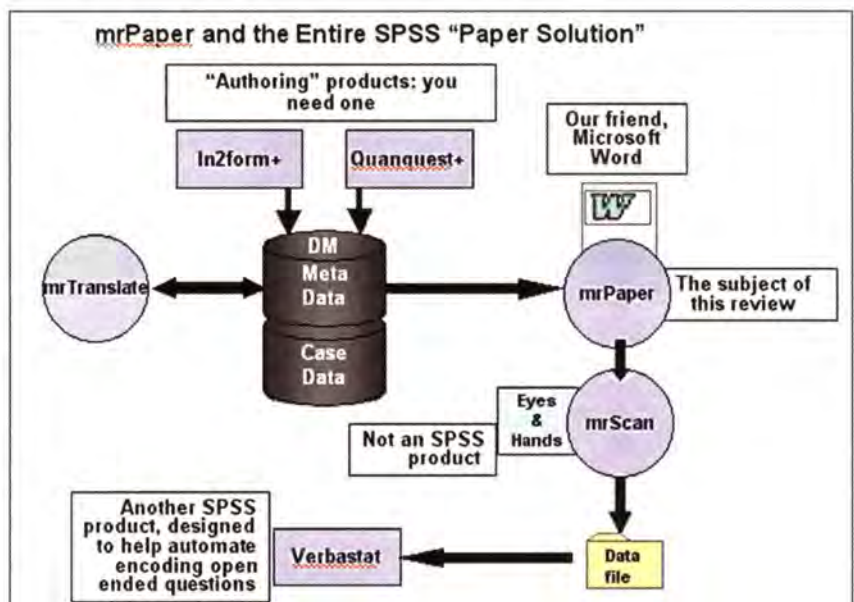


Figure 5: How mrPaper works with other programs to handle scanned documents.

worth investigating and considering carefully.

While we can point out that this product is interesting, though, there most certainly does not seem to be any “off the shelf” solution that we can recommend as likely to meet most organizations’ needs. As you can see from Figure 5, the program is intended to work best and most efficiently as part of a suite of SPSS applications, or as SPSS calls it, “the SPSS paper solution.” You most likely will want to speak to your friendly SPSS representative about this product, then, since you will need to make some decisions about your needs for one or more of the related programs. This most likely will require that you engage in some careful discussion about, and deliberation of, the alternatives.

### And now to the conclusion

Looking back at the three programs discussed, your reviewer will get to enjoy an appropriately beneficent feeling, since this review is being completed right after the Christmas holiday. These programs all appear to be, in brief, “very good stuff.”

• NCSS seems like an excellent choice, both for those hoping to start with more in-depth statistical analysis, and as a supplement to other programs for more experienced users who need some of the many features it offers. (As a reminder, while NCSS costs \$300 with documentation on disk, we also

recommend that you spend the extra \$100 to get the excellent paper-based manuals.)

- PASS offers the most comprehensive approach to “power analysis” that your reviewer has yet seen, and does as much as possible to make something approachable and useable out of this sometimes arcane area.

- The new mrPaper program from SPSS looks like a remarkable step toward simplifying and streamlining the process of creating paper-based questionnaires.

Overall, then, there seems to be quite a bit to praise in a wide range of areas, and only a few scattered grumbles. Being able to say that is truly remarkable when dealing with the mysterious world of software.

Those of you who still have more than one eye half open are invited to address any questions or (positive) comments directly to your reviewer at the e-mail address following. Complaints and criticism can be sent to top management — although I seem to have lost their address, but doubtless will get right back to you with it. This will happen any time, very soon. Right now it’s practically in the mail.

#### Important addresses

- You can reach Steven Struhl at: [smstruhl@aol.com](mailto:smstruhl@aol.com)
- You can find information and even free evaluation downloads of NCSS at: [www.ncss.com](http://www.ncss.com).
- You can find information on mrPaper and many other SPSS products at: [www.spss.com](http://www.spss.com).
- We know we have that address for complaints somewhere. We’ll keep looking.

## Survey Monitor

continued from p. 8

year-round trend, manufacturers are introducing better-quality accessories such as barbecue tools with rosewood handles and nonstick heads.

- Hand-painted glassware and stemware continues to be the dominant trend in casual tabletop assortments while crackle glass and "craza" techniques — where colored glass is pulled through the piece — are also featured.

- Decorative photo frames that can also be used as clocks, pen holders, paper clip holders, storage boxes and CD boxes are the latest trends in home and home-office décor.

- Trend: multi-dimensional cooking appliances that combine radiant, conduction and convection technologies to make cooking faster and easier.

- Massage and magnetic therapy products will continue to rise as alternative and complementary pain relief methods.

- The desire for healthier living will prompt more consumers to demand

next-generation blood pressure monitors, such as wristwatch units.

- Fashion-forward storage and organization products for the kitchen, bath and garage will continue to be popular, particularly bright colors and bright metals, such as chrome, as well as light wood and fabric combinations.

- Trend: ready-to-assemble (RTA) furniture featuring multiple components that can be configured in multiple ways.

- Higher-quality futons featuring European looks, such as steel and wood combinations, will also be highlighted.

- Outdoor camping equipment and accessories, such as nonelectric barbecue lighters and cookware, are expected to be popular.

### Watch TV, surf the Web

Individuals with Internet access report, on average, spending 3.8 hours a week both watching television and being online. For many of those individuals, the information they are seek-

ing when both online and watching TV revolves around the program they are watching.

Six percent of Internet-enabled individuals who viewed *Survivor*, for example, report that they went to the CBS Web site to get information about the show at some time while they were watching it. For both NBC's Olympics coverage and ABC's *Who Wants to Be a Millionaire*, 8 percent of Web-connected viewers indicate that they have been on the program Web site while watching. For CBS's *Big Brother*, 16 percent of Internet-enabled viewers report going to the show Web site for information while they were watching the program being broadcast.

These findings — from a new study jointly conducted by Burke, Inc., Cincinnati, and NFO Interactive, Greenwich, Conn. — suggest that program advertisers can increase their exposure to audiences by also looking for sponsorship opportunities on program Web sites. The study, "Connecting With Viewers: TV Programs and Their Web Sites," surveyed 8,605 NFO

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Interactive panelists to discover more about the evolving relationship between television and the Internet.

Adults surveyed via the Internet from October 9 to October 25 were first asked which of 315 programs on 27 broadcast and cable TV programs they had personally watched in the three months prior to being surveyed. Viewers of programs were then asked if they had ever gone to the network Web site for that program and, if so, whether they had gone to the Web site for program information during or after their viewing. Viewers of each network were also asked if they had ever decided to watch a program as a result of visiting that network's Web site.

"Some have suggested that the Internet is killing TV," says Cary Nadel, Burke vice president. "The findings from this study, however, show that Internet use not only coexists with TV viewing, it can encourage and enhance the viewing experience."

There is a strong relationship between television viewership and online activity. The more someone uses one media, the more that individual uses the other. (See Exhibit A.) This information helps the television networks, advertisers, and advertising agencies plan coordinated media campaigns that can take advan-

ever, report spending an average of 5.0 hours per week both being online and watching television, compared to 3.7 hours per week for those with dial-up access.

"If networks use their Web sites creatively, however, they should be able to migrate content back and forth between television and the Internet," says Tim Washer, vice president of media and telecom practice for NFO Interactive. "This should enable them to better serve broadband users. It might also help networks better serve program sponsors by opening up additional advertising opportunities for them on the Internet."

Thirty-two percent of study respondents indicated that they had spent less time watching television than usual in the month prior to taking the survey, while 52 percent said they had spent the same amount of time as usual and 17 percent said they had spent more time watching TV than usual. Those who said they had been spending less time watching TV were asked to select from a list of other activities to indicate what they had been doing instead of watching TV. Most of those who indicated watching less TV did not mention being online, and less than 2 percent of all individuals surveyed mentioned being online exclusively as the activity they were

shopping visits since the start of the season (see Table 1).

At its peak, the Nielsen//NetRatings Holiday E-Commerce Index, which measures home and work shopping trips to representative e-commerce sites in

**Table 1**  
**Top 15 Holiday Season E-Tailers, Ranked by Total Shopping Visits (U.S., Combined Home & Work for Weeks Ending November 5-December 24)**

Rank Site	Shopping Visits
1. amazon.com & Toys R Us	122,996,842
2. etoys.com	21,120,709
3. dell.com	21,001,245
4. Barnes and Noble	20,248,728
5. cdnow.com	20,019,849
6. walmart.com	18,007,889
7. hp.com	15,634,552
8. buy.com	14,527,981
9. jcpenny.com	14,463,598
10. bestbuy.com	12,482,813
11. hallmark.com	12,362,816
12. bluelight.com	12,211,428
13. ubid.com	11,798,569
14. sears.com	11,176,947
15. target.com	11,157,504

*Note: The list is comprised of online merchants, reflecting individual store brands whose primary focus is online sales, and which complete the transaction within its site. Excluded from this holiday list are sites related to travel, ticketing, auctions, financial services, and shopping aggregators, including comparison shopping sites and online malls. A visit is a single trip to a shopping site, including both home and work PC users. For holiday season 2000, Amazon.com includes traffic from its partnership with Toys R Us. Source: Nielsen//NetRatings, December 2000.*

eight product categories, grew 78 percent during the season. In the week ending December 24, the index declined 31 percent as shoppers moved their purchases offline.

"The 2000 holiday season will best be remembered for the onslaught of brick-and-mortar stores. In total, established offline brands account for 11 of the top 15 holiday e-tailers," says Sean Kaldor, vice president of eCommerce at NetRatings. "Strong brand awareness, millions of loyal customers, and proven retailing savvy led to the success of brick-and-mortars this year."

Amazon.com and Toys R Us, together through their alliance, dominated Nielsen//NetRatings' Top 15 Holiday Season E-tailers, with more than five times as many shopping trips as their next closest competitor. The largest brick-and-mortar retailer is Dell, fol-

**Exhibit A**

**Relationship Between Television Viewership and Online Usage**

TV Viewership (hours per week)	Online Usage (hours per week)
Heavy (16 or more)	14.7
Moderate (10-15)	11.6
Light (0-9)	9.4
Online Usage (hours per week)	TV Viewership (hours per week)
Heavy (16 or more)	21.4
Moderate (6-15)	16.9
Light (0-5)	15.1

tage of greater reach and frequency when both forms of media are used.

The growth of high-speed access to the Internet might, however, change the dynamics of the relationship between TV viewing and Internet use. Sixteen percent of survey respondents reported having high-speed Internet access, and their average weekly TV viewing time was 15.9 hours, compared to 17.4 hours of weekly TV viewing, on average, for individuals with dial-up access. Those with high-speed Internet access do, how-

engaging in instead of watching television. For more information contact Cary Nadel at 203-431-5901 or Tim Washer at 203-618-8606.

## Amazon.com top holiday e-tailer

New York-based Nielsen//NetRatings has announced the top e-tailers of the 2000 holiday shopping season. Amazon.com and Toys R Us led all e-tailers at a record-breaking 123 million



lowed very closely by Barnes & Noble at No. 4. Recovering from a slow start after the launch of its revamped Web site, Walmart.com secured the No. 6 spot with 18 million shopping trips.

As in the offline world, department stores led shopping activity online as well. More than half of the top 15 e-tailers are virtual department stores, meaning they sell products from a wide range of categories.

"Online shopping this season mirrored the trend for traditional retailers as the popularity of virtual department stores dominated other product cate-

gories," says Kaldor. "Web consumers favored the huge selections and the time-savings offered by virtual department stores, as they flocked to sites such as Amazon.com, Bluelight.com, Buy.com, JCPenney.com, Sears.com, Target.com, Ubid.com, and Walmart.com throughout the season."

**Table 2**  
**Nielsen/NetRatings Holiday E-Commerce Index Category Percent Growth During Peak Week**  
**(U.S., Total Shopping Visits, Combined Home & Work)**

Categories	% Growth at Peak Week	Week Ending
Specialty Gifts	264.0%	December 17
Toys & Games	137.6%	December 3
Apparel	129.8%	December 10
Consumer Electronics	114.8%	December 17
Virtual Department Stores	103.7%	December 10
Value-Oriented Sites	51.3%	December 10
Books/Music/Video	49.0%	December 10
Computer Hardware	7.9%	December 10
Total	77.9%	December 10

*Note: The index is comprised of five representative sites in each category, and acts as a barometer to gauge the level of usage of e-commerce sites during the holiday season. A visit is a single trip to a shopping site, including both home and work PC users. Source: Nielsen/NetRatings, December 2000.*

gories," says Kaldor. "Web consumers favored the huge selections and the time-savings offered by virtual department stores, as they flocked to sites such as Amazon.com, Bluelight.com, Buy.com, JCPenney.com, Sears.com, Target.com, Ubid.com, and Walmart.com throughout the season."

Although small in traffic by comparison, the fastest-growing product category is specialty gifts, which rocketed 264 percent at the peak of the holidays. Toys and games, an annual favorite of the holiday season, jumped 138 percent while the apparel category followed closely behind at a growth rate of 130 percent.

## Firms get low grades in high-tech from internal salespeople

America's corporations are getting low grades in high-tech from their own salespeople for not fully integrating sales force automation (SFA) systems

that can potentially provide better service to customers. This is despite the fact that the technologies to do so are available, or already in place in many cases, according to an independent study commissioned by Freedom Technology Media Group (FTMG), parent company of destinationCRM.com and *CRM Magazine*.

The study on SFA acceptance and practices in the U.S. was conducted for FTMG by the Institute for the Study of Business Markets at Penn State University. Some 787 sales represen-

tatives who work in a variety of manufacturing, services, trade, finance and information industries around the country, were surveyed. (Study results can be obtained online at [www.destinationcrm.com/sfastudy](http://www.destinationcrm.com/sfastudy).)

SFA is considered an umbrella term for software and systems designed to support individual field sales representatives. These systems help a company's sales force keep better track of important relationships, sales opportunities, inventory and other vital information to help better serve prospects and clients. Other system features include: online order taking and fulfillment, contact tracking and product availability, and other tools that improve efficiency throughout a sales cycle.

Just in the past few years, moves by business to fully automate their sales systems have become a major component of CRM – customer relationship management. CRM is one of the fastest-growing segments of new econ-

omy planning and e-commerce development today, as e-businesses, click-and-mortar hybrids and traditional companies rush to integrate a wide range of customer solutions and Internet efficiencies within virtually every industry.

As CRM initiatives take center stage now in every aspect of the business world, the market for CRM products and services is expected to grow to \$90 billion by the year 2003.

Among some key findings of FTMG's SFA study are:

- While 60 percent of the respondents felt SFA systems available were helpful for their job performance, only 14 percent were clearly satisfied by the level of training received from their corporate employers – so they could better use the systems.

- Even more telling, while a seemingly high 63 percent of all respondents indicated that they were accessing their SFA system daily, almost 33 percent felt they were not able to fully use its capabilities, or that they had completely integrated the system tools within their total sales process.

- This is contrasted with more than 80 percent of those responding who believed that using their SFA system was not a voluntary act. Consequently, the study postulates that many of America's salespeople may just be logging on due to mandatory policies. Researchers feel U.S. salespeople have not yet taken off and turned into automated *uber*-sales reps – with state-of-the-art tools at their fingertips.

The study raises an important question: Will companies lose prospects and threaten customer relationships if they do not take heed of these concerns and quickly get up to speed on SFA? "Every executive or manager involved in the sales process should be very concerned about these survey results," says Matt Purdue, editor, destinationCRM.com. "They are being pressured to improve their customer relationships using the latest technologies, but these results clearly show that technology alone will not make salespeople more effective. Companies must be vigilant in servic-

ing and supporting their salespeople, not just customers.”

## Seniors who reach prescription benefit caps more likely to leave Medicare HMOs

Reaching prescription benefit caps, or spending limits, may lead some seniors to drop out of their Medicare HMOs. This relationship was confirmed by a study conducted by Express Scripts Inc., a pharmacy benefit manager.

A synopsis of the study by lead author Emily R. Cox and her colleagues at Express Scripts was published in the November 22/29 issue of the *Journal of the American Medical Association (JAMA)*. The Robert Wood Johnson Foundation's Changes in Health Care Financing and Organization (HCFO) Initiative provided funding for the project. The summary of findings in JAMA may be accessed at <http://jama.ama-assn.org/issues/v284n20/ffull/jlt1122-6.html>.

The study confirmed and expanded upon previous research suggesting a link between exhaustion of prescription benefits and disenrollment from Medicare HMOs. Data used for the Express Scripts study covered two years, 1997 and 1998 – double the time period previously studied. The longer time period reinforces the validity of the conclusion that reaching prescription drug caps increases the likelihood of disenrollment. In addition, researchers evaluated the rate of re-enrollment in 1998 among those who disenrolled from their plans in 1997.

Over the two-year study period, the three Medicare HMO plans evaluated varied in cap amount and administration of cap. In 1997, plans A, B and C capped benefits at \$600, \$1,000 and \$1,500, respectively, and all were administered on a quarterly basis. Quarterly administered caps allow members to utilize one-fourth of their annual benefit per quarter. In 1998, all three plans capped benefits at \$1,000, with plans A and C administering their caps on a quarterly basis and plan B

administering its cap annually.

“We wanted to determine whether people who reach spending caps for prescription drugs are more likely to leave their health plans than those who do not reach their spending caps,” says Cox. “What we found is that the relative risk of disenrollment is two to three times greater for those whose annual prescription drug costs exceed the coverage limits of their plan. This finding held true, no matter how the plan was administered.”

The research team notes that other factors, such as dissatisfaction with physician networks, may have entered into the decision of some beneficiaries to leave their Medicare HMOs. However, the numbers suggest that prescription benefit caps do play a role in beneficiary behavior. For example, in 1997, the plan with the lowest cap had the highest disenrollment rate, approximately 19.3 percent. This same plan increased its annual cap by \$400 in 1998 and subsequently experienced the highest rate of re-enrollment – 21 percent of those who had dropped the plan in the previous year.

The study did not confirm whether beneficiaries, after dropping out of one plan, then enrolled in another plan with a prescription benefit. The team believes it is reasonable to assume, however, that beneficiaries with high prescription drug costs will seek alternatives providing prescription coverage, such as other Medicare HMOs, if available.

Currently, beneficiaries in Medicare HMO plans are able to enroll and disenroll on a monthly basis. Starting in 2002, however, beneficiaries' flexibility to switch plans will be curtailed. Once enrolled in a Medicare HMO, a beneficiary will be allowed to change plans only within the first six months of the year. Then, in 2003, this period will be reduced to the first three months of the year. As a result, beneficiaries with high prescription expenditures will lose an option to obtain additional prescription coverage at the time it is needed. For beneficiaries who reach cap after the first six months in 2002, or after the first three months thereafter, the only alternatives will be to remain in the health plan or return to fee-for-service Medicare. In either situation, those

individuals will have to pay the full cost of their medications out of pocket.

These findings are important in light of previous research conducted by Cox and her colleagues at the University of Arizona showing that beneficiaries who exhaust their capped prescription benefits are more likely to discontinue medications or take less than the prescribed amount. Such behaviors place these individuals at increased risk for morbidity and mortality.

Cox suggests that the study's findings hold important implications for the Health Care Financing Administration (HCFA), the federal agency that administers the Medicare program, as well as for private Medicare HMO plans currently providing capped prescription benefits.

“As we move forward with a Medicare prescription drug benefit, we need to understand how beneficiaries' behaviors will be affected by cost-management strategies such as benefit limits and apply that knowledge in designing the program. The same holds true for plan administrators who currently provide prescription benefits to seniors,” says Cox.

Cox also points out that, while current enrollment flexibility enables many seniors who exhaust their prescription cap to maintain coverage, switching plans may carry adverse consequences for both HMOs and beneficiaries. “Switching can be costly from an administrative point of view,” she says. “But even more consequential is that switching plans may mean a beneficiary has to change doctors or medications. That discontinuity potentially compromises quality of care.”

As older Americans approach the age of eligibility for Medicare benefits, says Cox, they need to be aware of the cost of pharmaceuticals and weigh any prescription drug benefit caps in making decisions about health care coverage. “If a person is relatively healthy when selecting a plan, it's easy to discount the importance of prescription drug coverage. But if that same person later develops a chronic disease, the financial importance of the prescription benefit is likely to become very apparent very quickly.”

## Research Industry News

continued from p. 15

Online and developed in collaboration with other QuickTake partners, extends the QuickTake survey capability to new media including online, voice recognition, two-way paging and wireless capabilities.

In December, the **Arbitron Company**, New York, began recruiting consumers and placing meters for its Philadelphia market trial of the Portable People Meter, its new radio, television and cable TV audience measurement device. Over a 10-week period, the firm intends to recruit and supply meters to a panel of 300 consumers for the first trial phase in the Philadelphia market. Arbitron plans to have over 70 broadcasters and cable networks serving the Philadelphia market encoding their signals by the time the panel is in place. The Portable People Meter is a pager-sized device that is worn by consumers throughout the day. It detects inaudible codes that broadcasters and cable networks embed in the audio portion of their programming using encoders provided by Arbitron. At the end of each day, the meter is placed into a base station that recharges the device and sends the collected codes to Arbitron for tabulation. The technology has been tested in the field in Manchester, England, in 1998 and in late 1999 to early 2000.

Braintree, Mass.-based **Perseus Development Corporation** announced that the PalmSource 2000 Conference in Santa Clara, Calif., in December was one of the first forums where conference surveys were completed using Palm Powered hand-held computers. SurveySolutions In Hand, a survey software application designed by Perseus, Palm, Inc., and Critical Path Software, allows for the creation of Web and e-mail surveys that can be deployed on a Palm Powered hand-held. Once completed, the survey administrator can compile and analyze the results and display them in tables or graphs.

### Acquisitions

Chicago-based **SPSS Inc.** has acquired eX Systems, a Japanese-based

agent and distributor of SPSS market research solutions, for approximately \$750,000 cash. As a result of the transaction, completed on Sept. 25, eX Systems' entire staff will integrate into SPSS MR, the SPSS operating group dedicated to serving the market research industry, while continuing to work out of their current location in Tokyo.

**NPD ShoeBiz**, the footwear tracking unit of Port Washington, N.Y., marketing information provider The NPD Group, Inc., has completed the acquisi-

tion of **Footwear Market Insights (FMI)**, a syndicated consumer purchase information company based in Nashville, Tenn.

### Alliances/strategic partnerships

Fort Washington, Pa., pharmaceutical research firm **TVG, Inc.**, and **WebSurveyResearch**, a New York survey company, have announced a partnership designed to deliver online primary marketing research surveys to assess physicians' awareness, attitudes and behaviors with regard to the use of

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Denver - Accudata Market Research, Inc.  
Detroit - MORPACE International  
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pharmaceutical and medical products. Under the terms of the letter of intent, beginning in 2001, TVG will become a charter member of WebSurveyResearch, gaining access to the WebSurveyResearch physician panel for performing marketing research. TVG will develop the questionnaires and analyze the data. WebSurveyResearch will host the surveys on the Internet and provide the raw data to TVG.

**NetZero, Inc.**, a provider of advertising- and commerce-supported Internet access, and NFO Worldwide, a Greenwich, Conn., research firm, have announced a strategic alliance among NetZero's CyberTarget division, NFO and its affiliate, InsightExpress. The agreement will give clients of NFO and InsightExpress access to household and individual samples drawn from NetZero's members, with targeting capabilities based upon demographics and/or Internet usage.

Separately, but also as part of this agreement, NFO will offer NetZero's free Internet access service, including its zCast tracking software, to members of its existing household panels. With appropriate household permission, this will enable NFO to evaluate online behavioral data combined with offline research data gathered from its panelists. The agreement also calls for CyberTarget and NFO to develop co-branded research applications based upon NetZero members' anonymous clickstream data, focusing on various industry vertical markets.

**NFO Worldwide** has also announced a new relationship with Terra Lycos, a global Internet network, to expand NFO's interactive panel of consumers over the next two years. As part of the agreement, NFO will become a primary research supplier to the Lycos Network of Web sites.

**Alchemedia**, a San Francisco provider of software and services to prevent the theft of proprietary information online, has announced that **BuzzBack**, a new online platform for qualitative research, will use Alchemedia's Clever Content technol-

ogy to protect the information featured in its online consumer research sessions. Clever Content prevents the copying, printing, and screen capturing of visual information on intranets, extranets, and the Internet.

Rochester, N.Y., research firm **Harris Interactive** will work with **Sigma Dos Interactiva** (SDi), a new division of the Sigma Dos Group in Spain, to expand and develop online research capabilities in that region. Sigma Dos Group is comprised of 14 companies, five in Spain and the remainder in Portugal and Latin America. While Sigma Dos is the main offline research agency of Sigma Dos Group, Sigma Dos Interactiva will be fully dedicated to online social, political, marketing and branding/corporate image research.

## Awards

The Chicago Software Association (CSA) has awarded **SPSS** its Enterprise Award at the CSA's 2000 Achievement Awards. The Enterprise Award is presented to the CSA member company which, through sustained growth, national reputation and recognized excellence in products and services, best represents the Silicon Prairie's stature as home to quality information technology companies. The winning company must have at least \$10 million in annual revenue, be financially strong, exhibit a commitment to customer service and have established a unique place in its market. SPSS also won the Enterprise Award in 1998.

Maritz Inc., St Louis, was ranked 157th among the top 500 private companies in the November 27th issue of *Forbes* magazine. **Maritz Marketing Research Inc.** was among the divisions cited as an example of the company's growth and diversity.

## New accounts

Statistica, a data analysis and graphing software from Tulsa, Okla.-based **StatSoft, Inc.**, has been named a corporate PC statistics software package by BP, an energy and petro-

chemical firm.

San Diego-based **Cardiff Software, Inc.**, a forms processing and business automation firm, and **CaptureIT (Australia) Pty. Ltd.**, a data collection and data capture firm, announced that the New South Wales Board of Studies has used Cardiff TELEform in Sydney to process more than 1.1 million Higher School Certificate (HSC) and School Certificate answer and marker sheets.

**Millward Brown**, a Naperville, Ill., research firm, has purchased a three-year license of **SPSS Inc.**'s market research software. SPSS MR, the market research arm of SPSS, will provide Millward Brown with a set of tools for use in its research process.

The Social & Health Services (SHS) unit of **Opinion Research Corporation**, Princeton, N.J., has been awarded a \$1.8 million subcontract in the federal government's new school violence prevention program. Under the subcontract, SHS will provide communications and social marketing technical assistance to the grantee school districts around the country selected by the Center for Mental Health Services to participate in its Safe Schools/Healthy Students Initiative.

## New companies/new locations

A new research firm, **KLJ Field Services**, is set to open this month at 94 Wentworth Rd., Windsor, Nova Scotia, Canada, B0N 2T0. Phone 902-482-0063. Fax 902-423-9546.

SIVI (Seet Internet Ventures, Inc.), an Internet accelerator in Los Angeles, has launched its newest site, **StatSurvey** ([www.statsurvey.com](http://www.statsurvey.com)), which provides online research services.

The Web site **www.indiastat.com** is now available to offer researchers socioeconomic information, services and data about India and its states.

A new B2B publishing and online professional services marketplace, **www.ecountries.com**, is offering market research reports and also an RFP service for marketing researchers.

## Product & Service Update

continued from p. 12

Worldwide (ASW), recently completed an analysis of its National Retail Census 2000, which includes "A Decade of Change" — a retrospective that measures the increase and decrease of retail outlets throughout the U.S. during the last decade. The results, issued in MarketPlace Intelligence's *Report to Retailers and Marketers*, reveals a 38 percent surge in the number of chain drugstores from 1990 to 2000. In sharp contrast, the number of independent drugstores dropped by 22.3 percent.

The National Retail Census 2000 contains several statistics to corroborate this theory. The number of retail prescriptions dispensed grew from two billion in 1992 to nearly three billion in 2000. Despite the fact that many chain drugstores are effectively mini-marts built in front of a prescription counter, chains dispensed more than 60 percent of all prescriptions filled — more than four million a day.

Fast-food restaurants are also thriving, with their number of outlets growing by 14.2 percent over the last decade. The last 30 years saw fast-food outlets more than double — soaring from just 50,000 outlets in 1970 to almost 137,000 today.

Beauty salons are also increasing at a rapid pace, with their outlet numbers expanding by 10.8 percent over the past 10 years, helped substantially by the burgeoning subgroup of nail specialty shops, which are included in this category. Other high-growth categories include hotels and motels, increasing by 9.4 percent, and used car dealerships, growing by 8.5 percent. Conversely, several categories show sharp declines in their outlet counts. Home centers fell by 20.8 percent, while camera shops dropped 18.8 percent and barbershops plummeted by 23.9 percent.

MarketPlace Intelligence gathers data through in-person store visits to a national probability sample of over 35,000 outlets across all retail categories, in more than 800 different geographic areas. For more

information contact Carl Ravitch at 800-274-3577, ext. 1620, or at [cravitch@surveys.com](mailto:cravitch@surveys.com), or visit [www.surveys.com](http://www.surveys.com).

## New testing facilities at Shuster

Shuster Laboratories, Inc., a provider of consumer testing and sensory services, has opened new facilities at its headquarters in

Canton, Mass. The firm has added full-service central location testing, new focus group facilities, and expanded its sensory evaluation labs. The sensory labs house technical panel booths for descriptive analysis and difference tests as well as a test kitchen for sensory evaluation and consumer testing. For more information visit [www.shusterlabs.com](http://www.shusterlabs.com) or call 781-821-2200.

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## Washington Gas

continued from p. 19

would ask, 'What does this mean? Will the quality of gas be affected? What if I have a gas leak, what are the implications?' Guess what, it doesn't matter."

Holland: "Both participants and non-participants had some skepticism about whether or not this would save them any money. To a large degree there was a sense of inertia. People said, 'I have been happy with my service and haven't had to think about it. Now you are asking me to think about all this stuff. No thank you.'"

The four most important factors influencing the decision to participate were guaranteed savings (54 percent), receiving one bill (47 percent), a cap on the price they pay for natural gas (42 percent), and cash incentives from providers for switching (31 percent).

Direct mail (cited by 54 percent of all respondents) and bill inserts (17 percent) were the two largest sources of awareness of the program. Reading direct mail and consulting newspaper articles were the two main steps people took to learn about the program before deciding to sign up.

Not surprisingly, "low gas prices" was the thing participants liked best about their new gas supplier.

### Helped later

The findings from the surveys of Maryland consumers were very helpful when it came time to roll out the program in Virginia and the District of Columbia a few years later, Holland says. "We were able to get programs in Virginia and D.C.

going quicker than before and in the first year we did the surveys in Virginia and D.C., customer satisfaction was higher than it had been in the first year in Maryland because we were able to incorporate the lessons we learned.

"We were using the surveys to test different program aspects and every time we made a change another survey came up and it was used to measure customer satisfaction with the program to see what differences



there were between participants and non-participants."

Customers were adamant about receiving just one bill, instead of one each from Washington Gas and one from the alternative gas supplier. "The gas marketers wanted to bill the customers for the same reason we wanted to bill them: that bill is a very good tie that you have with the customer. It is a piece of communication that you get with them every month, and losing that is a big cost. The marketers wanted to send their own bills but customers absolutely hated getting two bills, so Washington Gas stopped billing them," Holland says.

One area that still needs work is communicating that using an alternative gas supplier doesn't change emergency response procedures, the quality of the gas, or the supply of gas. "We haven't seen an increase

in the level of customers understanding that things will not change over the five years that the Maryland program has been in existence. So that has been a disappointment for us and shows we have more work to do in getting those points across to people," Holland says.


In Maryland, overall satisfaction with the program rose from year to year, as did the number of respondents saying it was easy to sign up. Research findings pointed the way to

expanding methods of signing up for the program. Initially customers could only sign up by mail; Internet and phone sign-ups are now also an option.

And the number of respondents claiming to have found unexpected charges on their gas bill dropped to 8 percent in 1998-

1999 from 20 percent in the 1997-1998 period. (In most cases these problems were a result of formerly aggregated costs being broken out on bills from the new gas providers.)

### Running smoothly

The surveying has stopped in Maryland, now that 100,000 customers are participating in the program and it is running smoothly. Holland expects things to continue to go well as the Virginia and D.C. programs mature, though the energy market has surely changed since deregulation began. Natural gas prices may never return to previous levels – perhaps the good old days are gone forever – but they are bound to stabilize again. When they do, consumers will again turn to programs like the one offered by Washington Gas for consistent service and consistent pricing. 

Listed below are names of companies specializing in qualitative research moderating. Included are contact personnel, addresses and phone numbers. Companies are listed alphabetically and are also classified by state and specialty for your convenience. Contact publisher for listing rates: Quirk's Marketing Research Review, P. O. Box 23536, Minneapolis, MN 55423. Phone 952-854-5101. Fax 952-854-8191. Or visit [www.quirks.com/media/moderator.html](http://www.quirks.com/media/moderator.html).

## Access Worldwide, Cultural Access Group

5150 El Camino Real, Ste. B-15  
Los Altos, CA 94022  
Ph. 800-671-9525  
Fax 650-965-3874  
E-mail: [info@accesscag.com](mailto:info@accesscag.com)  
[www.accesscag.com](http://www.accesscag.com)  
Contact: David Morse  
Contact: Jannet Torres  
Latino/African-American/Asian, Full-Service Market Research.

## Ackermann Public Relations & Mktg.

1111 Northshore Dr., Ste. 400  
Knoxville, TN 37919-4046  
Ph. 865-588-9280  
Fax 865-584-5960  
E-mail: [rbryant@directionsdata.com](mailto:rbryant@directionsdata.com)  
Contact: Rebecca Bryant  
Advanced RIVA-Trained  
Moderator/Focus Facility/Phonebank.

## ActiveFocus

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Pittsburgh, PA 15201  
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E-mail: [cjrobbs@activefocus.com](mailto:cjrobbs@activefocus.com)  
[www.activefocus.com](http://www.activefocus.com)  
Contact: Carole J. Robbins  
Meeting Your Business Goals With Focused Yet Flexible Designs, Insightful Probing & Concise Reports.



Jeff  
Anderson  
Consulting

## Jeff Anderson Consulting, Inc.

1545 Hotel Circle S., Ste. 275  
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Contact: Jeff Anderson, CPCM, MBA  
"Blending Art With Science." Member ORCA/AMA.

## AnswerSearch, Inc.

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Contact: Catherine Giordano  
Full-Service Qual. & Quant.  
Consumer/Business-to-Business.

## AutoPacific, Inc.

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Ph. 714-838-4234  
Fax 714-838-4260  
E-mail: [gpeterson@autopacific.com](mailto:gpeterson@autopacific.com)  
[www.autopacific.com](http://www.autopacific.com)  
Contact: George Peterson  
Auto Marketing & Product Experts.  
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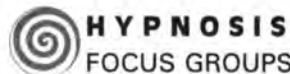
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Contact: Vivian Hernandez  
Contact: Gloria Canteñis  
Multi-Country/Multi-Market Foc. Grp.  
Rsch. U.S./Latin Amer./Caribbean.  
Native Brazilian Moderator.

## Sunbelt Research Associates

1001 N. U.S. One, Ste. 310  
Jupiter, FL 33477  
Ph. 561-744-5662  
E-mail: sunbeltra@aol.com  
www.sunbeltresearch.com  
Contact: Barbara L. Allan  
20+ Years Exp.; Business & Consumer  
Studies; Nat'l. & Int'l. Exp.

## Target Market Research Group, Inc.

4990 S.W. 72 Ave., Ste. 110  
Miami, FL 33155-5524  
Ph. 800-500-1492  
Fax 305-661-9966  
E-mail: martin\_cerda@tmrgroup.com  
www.tmrgr.com  
Contact: Martin Cerda  
Hispanic Qual./Quant. Research-National  
Capability.

## Thorne Creative Research

480 Mamaroneck Ave.  
Harrison, NY 10528  
Ph. 914-381-5533 or 914-381-5554  
Fax 914-381-5557  
E-mail: gthorne@thornecreative.com  
www.thornecreative.com  
Contact: Gina Thorne  
Sensitive Issues/Actionable Results With  
Kids, Teens. HI-Tech, Idea Generation.

## View Finders Market Research

11 Sandra Lane  
Pearl River, NY 10965  
Ph. 914-735-7022  
Fax 914-735-7256  
E-mail: JGAINES246@aol.com  
www.view-finders.com  
Contact: Janet Gaines  
Specializing in Advertising, Political,  
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## Wilson Qualitative Research Consultants

10, rue de la Terrasse  
75017 Paris  
France  
Ph. +33-1-39-16-94-26  
Fax +33-1-39-16-69-98  
E-mail: jonwqrc@club-internet.fr  
Contact: Jonathan Wilson  
For A Full Qualitative Service and/or  
Moderation (French/English): New Tech.,  
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JRH Marketing Services, Inc.  
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Paul Schneller Qualitative LLC  
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Ackermann Public Relations & Mktg.

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Decision Analyst, Inc.  
First Market Research Corp. (Heiman)  
Opinions Unlimited, Inc.

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### Washington

Burr Research/Reinvention  
Prevention

### Wisconsin

Chamberlain Research Consultants, Inc.

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Wilson Qualitative Research Consultants

### Germany

insight europe gmbh

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Cambridge Research, Inc.  
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Erich Transcultural Consultants  
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Paul Schneller Qualitative LLC  
Strategy Research Corporation

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Decision Drivers  
Just The Facts, Inc.

Knowledge Systems & Research, Inc.  
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Global Qualitative Group, LLC  
Low + Associates, Inc.  
Market Resource Associates

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Strategic Focus, Inc.

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Research Connections @ Talk City  
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MarketResponse International  
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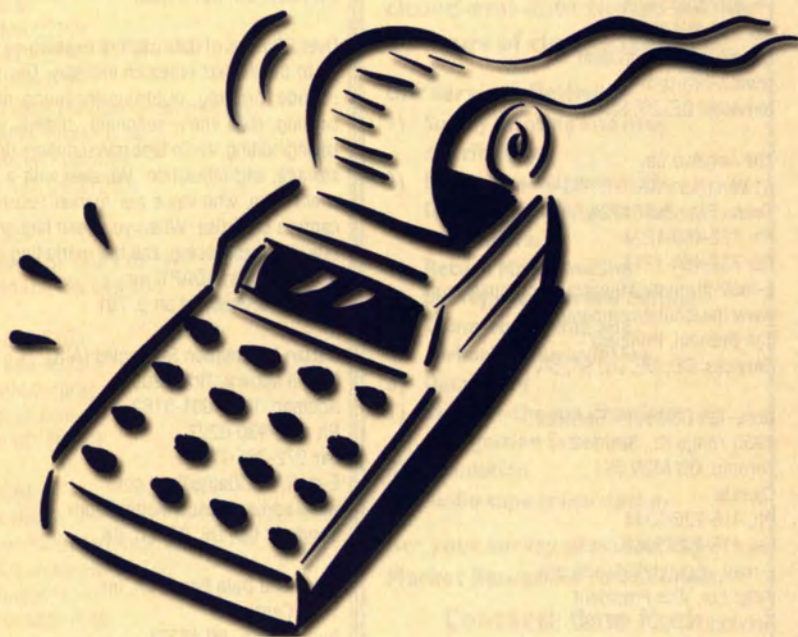
MarketResponse International

# 2001 Directory of Statistical Analysis *and* Data Processing

The 2001 Directory of Data Processing and Statistical Analysis was compiled by sending listing forms to firms we identified as providers of data processing and statistical analysis services. This year's directory lists over 300 firms, arranged alphabetically. In addition to the company's vital information, we've included the types of data processing services they provide (coding, data entry, data tabulation, scanning services and statistical analysis). A cross-reference of these services is also offered for your convenience.

Directory of Data Processing and Statistical Analysis begins on page 78.

Cross-reference of data processing services begins on page 98.



## Service Codes

CD	.....	Coding
DE	.....	Data Entry
DT	.....	Data Tabulation
SC	.....	Scanning Services
SA	.....	Statistical Analysis

A & G Marketing Research, Inc.  
276 Fifth Ave.  
New York, NY 10001  
Ph. 212-686-6370  
Fax 212-779-3297  
E-mail: agrsch@aol.com  
Services: SA

ABACO Marketing Research, Ltd.  
Sao Paulo Marketing Center  
Rua Minas Gerais, 396  
01244-010 Sao Paulo  
Brazil  
Ph. 55-11-257-0711 or 55-11-257-0030  
Fax 55-11-256-3982  
E-mail: abaco@amcham.com.br  
www.abacoresearch.com  
Alan Grabowsky, President  
Services: CD, DE, DT, SC, SA

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

Accountability Information Management, Inc.  
553 N. North Court, Ste. 160  
Palatine, IL 60067  
Ph. 847-358-8558  
Fax 847-358-8089  
E-mail: info@a-i-m.com  
www.a-i-m.com  
Services: DE, DT, SA

The Accutab Co.  
51 Wyckham Rd.  
Tinton Falls, NJ 07724  
Ph. 732-460-1224  
Fax 732-460-1215  
E-mail: jbrunetti@theaccutabcompany.com  
www.theaccutabcompany.com  
Jon Brunetti, Principal  
Services: CD, DE, DT, SC, SA

Accu-Tab Computer Services  
4950 Yonge St., Ste. 312  
Toronto, ON M2N 6K1  
Canada  
Ph. 416-226-5344  
Fax 416-226-1062  
E-mail: accutab@idirect.com  
Peter Lui, Vice President  
Services: CD, DE, DT, SC, SA

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St. Louis, MO 63105  
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Fax 314-726-2503  
E-mail: vlsavala@us.ibm.com  
www.ibm.com  
Vicki Savala or Steve Lemon  
Services: CD, DE, DT, SC, SA

ACG Research Solutions, an IBM Company, is a full-service market research firm with extensive research capabilities, and has a 40-station CATI (computer-aided telephone interviewing) system. Data collected on the CATI system is imported directly into WinCross or SPSS for Windows for analysis. Analysis capabilities are extensive, including: crosstabs with significance testing, analysis of variance, multivariate and conjoint analysis, discrete choice, perceptual mapping, etc. (See advertisement on p. 40)



### ADAPT, Inc.

5610 Rowland Rd., Ste. 160  
Minnetonka, MN 55343  
Ph. 888-52-ADAPT  
Fax 952-939-0361  
E-mail: dkoch@adaptdata.com  
www.adaptdata.com  
Dave Koch, General Manager  
Services: CD, DE, DT, SC

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Adrian Information Strategies (AIS)  
14675 Midway Rd., #200  
Addison, TX 75001-3162  
Ph. 972-980-0227  
Fax 972-385-7745  
E-mail: RCCDallas@aol.com  
www.adrianreyesconsulting.com  
Services: CD, DE, DT, SC, SA

Advanced Data Research, Inc.  
1092 Centre Rd.  
Auburn Hills, MI 48321  
Ph. 248-371-1857 ext. 213  
Fax 248-371-1869  
E-mail: miller@adrsoft.com  
www.adrsoft.com  
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Suite 1600 Sun Life Place  
10123 - 99 St.  
Edmonton, AB T5J 3H1  
Canada  
Ph. 780-944-9212  
Fax 780-426-7622  
www.advanis.ca  
Services: SA

Advantage Research, Inc.  
W202 N10246 Lannon Rd.  
Germantown, WI 53022  
Ph. 262-502-7000 or 877-477-7001  
Fax 262-502-7010  
E-mail: ssegrin@ariadvantage.com  
www.ariadvantage.com  
Scott Segrin, Vice President  
Services: CD, DE, DT, SA

Advantis Research & Consulting, Inc.  
2600 Eagan Woods Dr., Ste. 80  
St. Paul, MN 55121  
Ph. 651-452-8632  
Fax 651-452-9820  
E-mail: marketing@advantisresearch.com  
www.advantisresearch.com  
Services: CD, DE, DT, SA

AIS Market Research  
1320 E. Shaw, Ste. 100  
Fresno, CA 93710  
Ph. 800-627-8334 or 559-252-2727  
Fax 559-252-8343  
E-mail: aisres@psnw.com  
Services: CD, DE, DT, SC, SA

American Opinion Research/Integrated Mktg. Svcs.  
Environmental Research Associates  
279 Wall St.  
Princeton, NJ 08540  
Ph. 609-683-0187  
Fax 609-683-8398  
E-mail: lkaufman@lmsworld.com  
www.lmsworld.com  
Services: CD, DE, DT, SA

The AMI Group of Companies  
9/F, Leighton Centre  
77 Leighton Road  
Causeway Bay  
Hong Kong  
Ph. 852-2881-5388  
Fax 852-2881-5918  
E-mail: marketing@ami-group.com  
www.ami-group.com  
Services: CD, DE, DT, SC, SA

Analysis & Research Service  
P.O. Box 351  
Lansdale, PA 19446-0351  
Ph. 215-859-8378  
Fax 215-361-2491  
E-mail: data\_analysis@consult.com  
www.myfreeoffice.com/analysis  
Kevin Chen, Ph.D.  
Services: CD, DE, DT, SC, SA

**The Analytical Group, Inc.**

8687 E. Via de Ventura  
Scottsdale, AZ 85258  
Ph. 480-483-2700  
Fax 480-905-1416  
E-mail: Jack@acsinfo.com  
www.acsinfo.com  
Jack Pollack, President  
Services: CD, DE, DT, SC, SA


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(See advertisement on p. 104)

**Andover Research Associates, Inc.**

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**Answers Research, Inc.**

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Ph. 858-792-4660 or 800-293-3282  
Fax 858-792-1075  
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**Apian Software, Inc.**

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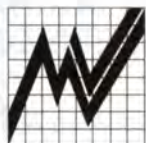
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Thomas Aragones, Managing Director  
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Gary Mullet Associates, Inc.  
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Lawrenceville, GA 30044  
Ph. 770-931-1060  
Fax 770-931-3654  
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Fax 402-785-2073  
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(See advertisement on p. 93)

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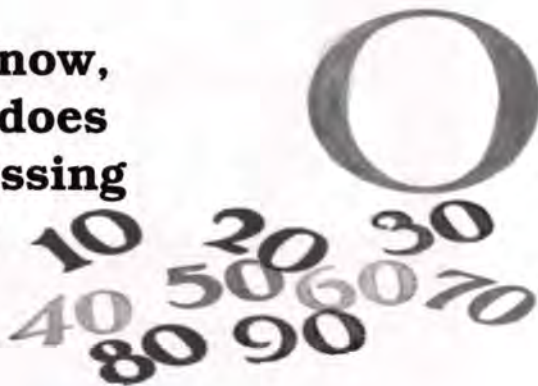
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**Mercator Corporation**  
 MERCURY Marketing and Research Consultants  
 MessageMedia  
 Meta Information Services  
 Michelson & Associates, Inc.  
**Microtab, Inc.**  
 Mid-America Research/Facts In Focus  
 The Miller Research Group, Inc.  
 MindSearch  
**Modalis Research Technologies, Inc.**  
 MR&S Market Research & Services GmbH  
 Gary Mullet Associates, Inc.  
 National Survey Research Center  
 NCS  
 NetRaker  
 Niche 1 Insight, Inc.  
 NIPO Software  
 MMR Research  
 North Coast Behavioral Research Group  
 O'Connor & Associates  
 C.J. Olson Market Research, Inc.  
 Opinion Research Taiwan  
**Opinion Search, Inc.**  
 OPINIONation

Opti-Market Consulting, Spain  
 Optimum Solutions Corp.  
**PAI-Productive Access, Inc.**  
 Paradigm Technologies Int'l.  
 Pat Henry Market Research, Inc.  
 Perseus Development Corporation  
 PhoneSolutions, L.L.C.  
**Pine Company**  
 PMR-Personal Marketing Research, Inc.  
 Point-of-View™ Survey Systems  
 Points of View Research & Consulting, Ltd.  
 Power Knowledge Software  
 P-STAT, Inc.  
 Pulse Analytics, Inc.  
**Pulse Train Ltd.**  
 QMark Research & Polling  
 QPSMR Limited  
 Quantum Consulting, Inc.  
 Quest Research  
 QUESTAR  
 Raosoft, Inc.  
 ReData, Inc.  
 Renaissance Research & Consulting  
 Research Connections @ Talk City  
 Research Data, Inc.  
 Research International USA  
 The Research Spectrum  
 RONIN Corporation  
 RTNielsen Company  
 Ruf Strategic Solutions  
 Saja Software, Inc.  
 Salford Systems  
 Scantron Surveys  
 SDR Sampling Services  
 Service Measurement Group, Inc.  
 Service Strategies International, Inc.  
 Southwest Planning & Marketing  
 Spectra Marketing Systems, Inc.  
 Spring Systems  
**SPSS MR**  
 Standard Data Corporation  
 Standard Data Prep  
**Star Data Systems, Inc.**  
 StatPac, Inc.  
 StatPoint, LLC  
 StatSoft, Inc.  
 Strategic Insights, Inc.  
 Strategic Marketing Services  
**STS Market Research**  
 Superior DataWorks, LLC  
 Survey Analysis, Inc.  
 Survey Service, Inc.  
 Surveys & Forecasts, LLC  
 SurveySite Inc.  
 TAB HOUSE Marketing Research Services  
 Tab-It Services, Inc.  
 Tactician Corporation  
 Techtel Corporation  
 A. Tent & Associates  
 Tragon  
 Trainor Associates  
 Triton Technology  
 Venture Marketing Associates, Inc.  
 Venture Research Corporation  
 VOXCO Inc.  
 WAC of New York  
 Watts Marketing Research  
 WebSurveyor Corporation  
 Westat, Inc.  
**Western Wats Data Services Center**  
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 Marketing Research Review

# 2001 Directory of Marketing Research Software

The 2001 Directory of Marketing Research Software was compiled by sending listing forms to companies we identified as producers/vendors of marketing research-related software. This year's directory lists over 150 firms and over 400 software titles. The software firms are arranged alphabetically. Along with the company's vital information, we've also included the title(s) of the software they sell. There is also a cross-reference of software features/functions as well as an alphabetical cross-reference list of the software titles.

Directory of Marketing Research software begins on page 104.  
Cross-reference of software features/functions begins on page 122.  
Cross-reference of software titles begins on page 127.



Able Software Corp.  
5 Appletree Ln.  
Lexington, MA 02420-2406  
Ph. 781-862-2804  
Fax 781-862-2640  
E-mail: info@ablesw.com  
www.ablesw.com  
Dr. Yecheng Wu, President  
Software:  
R2V for Windows & NT  
3D-Doctor

Advanced Data Research, Inc.  
1092 Centre Rd.  
Auburn Hills, MI 48321  
Ph. 248-371-1857 ext. 213  
Fax 248-371-1869  
E-mail: miller@adrsoft.com  
www.adrsoft.com  
Software:  
Abase

## AFFORDABLE SAMPLES, INC.

Since 1991, Delivering Quality Survey Research Samples

**Affordable Samples, Inc.**  
185 Sound Beach Ave.  
Old Greenwich, CT 06870  
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Fax 203-637-8569  
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James Sotzing, President

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Americom Research, Inc.  
25 Main St. E.  
Wartrace, TN 37183  
Ph. 931-389-6094  
Fax 931-389-6096  
E-mail: billa@edge.net  
www.research.net  
Bill Ahlhauser, Exec. Vice President  
Software:  
Hyper Q Phone  
Hyper Q Lite  
Hyper Q Plus  
Hyper Q I-Net

The  
*Analytical*  
Group Inc.

**The Analytical Group, Inc.**  
8687 E. Via de Ventura  
Scottsdale, AZ 85258  
Ph. 480-483-2700  
Fax 480-905-1416  
E-mail: Jack@acsinfo.com  
www.acsinfo.com  
Jack Pollack, President  
Software:  
WinQuery  
WinCross  
Knockout  
Juggler  
WinLink  
Sp-Link  
Q-Leap  
Arthur  
M-Link

WinQuery, Windows-based computer-aided interviewing system featuring easy questionnaire set-up, sample management, quota control, interviewing productivity and disposition reports. WinCross, a Windows-based crosstabulations system. Full featured tabulations with point-and-click Windows ease of use. WinCross features include a spell checker, editor, database and graphics capability. (See advertisement on p. 104)

## Apian Software

**Apian Software, Inc.**  
400 N. 34th St., Ste. 310  
Seattle, WA 98103  
Ph. 800-237-4565 ext. 13 or 206-547-5321  
Fax 206-547-8493  
E-mail: sales@apian.com  
www.apian.com  
Software:  
Survey Pro  
Survey Designer (component of Survey Pro)  
Survey Reporter (component of Survey Pro)  
Key.collect  
Net.collect  
Direct.Collect  
CAPI Collect

Survey Pro for Windows is your total solution for surveys. Design polished questionnaires using automated layout tools, selecting among pre-built scales or creating your own. Enter data into the automatically generated data entry screens or bring responses in from scanners, the Web, or other sources. Analyze responses with tools ranging from basic frequencies to complex crosstabulations and respondent segmentation. Create professional reports with point-and-click tables, pie charts, bar graphs, comments, headings and graphics. Consider Key.collect for multi-user and distributed data entry, or Net.collect for HTML form design and Web data collection. Multi-user licenses available. (See advertisement on p. 105)

## The Analytical Group, Inc.

The  
*Analytical*  
Group Inc.

### Software Developers of:

**WinCross™**  
Crosstabulation

**WinQuery™**  
CATI, CAPI



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

The Arbitron Company  
142 West 57th St.  
New York, NY 10019  
Ph. 212-887-1300  
Fax 212-887-1401  
www.arbitron.com  
Software:  
Maximi\$er  
Media Professional  
PD Advantage  
MapMAKER Direct  
Arbitrends  
MaxQualitative  
Tapscan  
Qualitap

ASDE Inc., PC Survey Sampler  
4 George Bilodeau, Ste. 106  
Hull, PQ J8Z 1V2  
Canada  
Ph. 819-770-3651 or 888-323-3651  
Fax 819-770-3688  
E-mail: info@surveysampler.com  
www.surveysampler.com  
Bernadette Quade  
Software:  
ASDE Survey Sampler - ASDE Survey Sampler -  
Canada

ATP Limited  
Roebuck House  
283 Upper Richmond Road West  
E. Sheen, London SW14 7JG  
United Kingdom  
Ph. 44-20-8878-4695  
Fax 44-20-8876-0439  
E-mail: info@atp.co.uk  
www.atp.co.uk  
Raz Khan  
Software:  
Winyaps  
yaps  
Specwriters' Work Bench

AutoData Systems  
6111 Blue Circle Dr.  
Minnetonka, MN 55343  
Ph. 612-938-4710 or 800-662-2192  
Fax 612-930-0100  
E-mail: sales@autodata.com  
www.autodata.com  
Software:  
AutoData Survey Plus 2000  
AutoData SDK  
AutoData Scannable Office

Beach Tech Corporation  
4131 Vincent Ave. S.  
Minneapolis, MN 55410  
Ph. 612-924-9193  
Fax 612-926-1145  
E-mail: sales@beachtech.com  
www.beachtech.com  
Software:  
Eform

Bruce Bell & Associates, Inc.  
425 Main St., Ste. 10  
Canon City, CO 81212  
Ph. 719-275-1661  
Fax 719-275-1664  
E-mail: hstanzel@surview.com  
www.surview.com  
Software:  
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 Apian Software

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www.apian.com  
www.surveyhost.com

(800) 237-4565  (206) 547-5321

Source 476

Bretton-Clark  
89 Headquarters Plaza  
North Tower, 14th fl.  
Morristown, NJ 07960  
Ph. 973-993-3135  
Fax 973-993-1757  
Software:  
Conjoint Designer  
Conjoint Segmenter  
Conjoint Analyzer  
Conjoint Linmap  
MCA#  
Simgrat  
Bridger

Bucknull & Masson  
International Marketing, Media & Research  
1 Maybury Court, Marylebone Street  
London W1G 8JE  
United Kingdom  
Ph. 44-20-7487-3272 or 44-7785-288-808  
Fax 44-20-7487-2632  
E-mail: JABmedia1@aol.com  
Software:  
SESAME

Business Forecast Systems  
68 Leonard St.  
Belmont, MA 02478  
Ph. 617-484-5050  
Fax 617-484-9219  
E-mail: info@forecastpro.com  
www.forecastpro.com  
Software:  
Forecast Pro  
Forecast Pro XE  
Forecast Pro Unlimited

CACI Marketing Systems  
14151 Park Meadow Dr.  
Chantilly, VA 20151  
Ph. 800-292-2224  
Fax 703-679-3343  
E-mail: msgw@hq.caci.com  
www.demographics.caci.com  
David Huffman, Managing Director  
Software:  
SiteReporter  
Sourcebook America  
ACORN

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1172 Beacon St.  
Newton, MA 02461  
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Fax 617-527-5113  
E-mail: info@caliper.com  
www.caliper.com  
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Transcad®

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Corvallis, OR 97333  
Ph. 541-757-1404  
Fax 541-757-1402  
E-mail: sales@camo.com  
www.infosens.com  
Software:  
IDA - Infosense Data Automation

Cardiff Software  
3220 Executive Ridge Dr.  
Vista, CA 92083  
Ph. 760-936-4500  
Fax 760-936-4800  
E-mail: sales@cardiff.com  
www.cardiff.com  
Software:  
Teleform Elite Version 7  
Teleform Elite - Enterprise Edition Ver. 7  
PDF + Forms  
HTML + Forms  
AutoMerge Publisher

Claritas Inc.  
5375 Mira Sorrento Pl., #400  
San Diego, CA 92121  
Ph. 800-234-5973  
Fax 703-812-2701  
E-mail: info@claritas.com  
www.claritas.com  
Software:  
Compass Analyzer  
MarketQuest Focus  
InfoMark  
iMark  
iMark Express  
ACE Indicators  
MicroVision  
PrecisionCode

CLT Research Associates Inc.  
18 W. 18th St.  
New York, NY 10011  
Ph. 212-390-5600  
Fax 212-390-5775  
E-mail: info@cltresearch.com  
www.cltresearch.com  
Software:  
Vrroom.com  
SV@

Cognos Corporation  
67 S. Bedford St.  
Burlington, MA 01803  
Ph. 781-229-6600 or 800-426-4667  
Fax 781-229-9844  
E-mail: susan.yeams@cognos.com  
www.cognos.com  
Software:  
4THOUGHT  
Cognos Scenario

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Fax 415-777-3128  
E-mail: cfmc@cfmc.com  
www.cfmc.com  
Leif Gjestland, President  
Software:  
SURVENT  
MENTOR  
COSI  
Sound-SURVENT  
Web-SURVENT  
Script Composer

CFMC offers a full-featured Web interviewing system, unequalled phone number management system, exceptional support staff, product R&D, custom programming, and service bureau services. Software products include SURVENT and Web-SURVENT (for interviewing), MENTOR and COSI (for data analysis) and Script Composer (a Windows-based system for composing questionnaires).

(See advertisement on p. 107)

Comstat Research Corporation  
17 John Alexander Dr.  
Cortlandt Manor, NY 10567  
Ph. 914-739-6800  
Fax 914-739-1671  
E-mail: comstat@cstat.com  
www.cstat.com  
Software:  
Text Analysis Program-TAP  
Interview & Analysis Program

CONVERSOFT (Axiom Software)  
130 Boulevard Camelinat  
92240 Malakoff  
France  
Ph. 33-1-40-84-84-04  
Fax 33-1-40-84-84-00  
E-mail: info@converso.com  
www.converso.com  
Software:  
CONVERSO CATI  
CONVERSO CAPI  
CONVERSO CASI

Creative Research Systems  
411 B St., Ste. 2  
Petaluma, CA 94952  
Ph. 707-765-1001  
Fax 707-765-1068  
E-mail: surveys@usa.net  
www.surveysystem.com  
Lisa Bacon, V.P. Sales  
Software:  
The Survey System  
The Survey System - Web

Cybernetic Solutions - The Survey Software  
3251 W. 6610 S.  
West Jordan, UT 84084-6902  
Ph. 801-966-0999 or 800-359-3386  
Fax 801-964-9574  
E-mail: cyberman@xmission.com  
www.xmission.com/~cyberman  
Software:  
THE SURVEY

Cytel Software  
675 Massachusetts Ave.  
Cambridge, MA 02139  
Ph. 617-661-2011 or 866-CYTEL11  
Fax 617-661-4405  
E-mail: sales@cytel.com  
www.cytel.com  
Dr. Cyrus Mehta, CEO  
Software:  
StatXact 4  
Proc StatXact  
LogXact

Data Vision Research, Inc.  
3490 U.S. Rte. 1, Bldg. 16B  
Princeton, NJ 08540  
Ph. 609-987-0565  
E-mail: ronv@dvrinc.net  
www.dvrinc.net  
Ron Vangi, President  
Software:  
MPA™ Data Entry  
Onceover™ Data Cleaning  
StatChek™ Stat Checking  
WinPrin



**DATAN, Inc.**  
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Washington, NJ 07882  
Ph. 609-921-6098 ext. 15 or 908-689-4060  
Fax 609-921-6731  
E-mail: merlin@datan.com  
www.datan.com  
Michael C. Stentz, Ph.D., President  
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MERLINplus (MERLIN plus Menus)  
FASTAB Ad Hoc Tabulation  
MPE Data Entry & Editing

DATAN promotes the application of appropriate data analysis methods to significant problems using modern technology. DATAN's role in supporting and extending the MERLIN Tabulation System is testimony to the central data analytic role of tabulation, the oldest form of data analysis known to humanity. DATAN recognizes the appropriateness of interactive, ad hoc tabulation in certain phases in the research process, production approaches to the recurring tasks, as well as the usefulness of graphical and statistical techniques throughout the analytical process.

(See advertisement on p. 83)

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E-mail: datanetics@aol.com  
Jerry Lisovich, Director  
Software:  
Custom Applications

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

## Dat@xiom Software, Inc.

**Dataxiom Software, Inc.**  
3700 Wilshire Blvd., Ste. 1000  
Los Angeles, CA 90010  
Ph. 213-383-9973  
Fax 213-383-3542  
E-mail: sales@dataxiom.com  
www.dataxiom.com  
Software:  
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Power & Precision  
Xpro  
NCSS

Dataxiom Software Inc. provides data analysis solutions for researchers and marketing research professionals. We offer a collection of very affordable statistical software such as StatMost, NCSS, Power & Precision and various interactive data analysis learning tools like Statistics on CD-ROMs. With expertise in various areas, we offer data analysis and statistical consulting to market research professionals.  
(See advertisement on p. 109)

DBM Associates  
One Salem Sq., Ste. 104W  
Whitehouse Station, NJ 08889  
Ph. 908-534-1665  
Fax 908-534-1244  
E-mail: bruce@dbma.com  
www.dbma.com  
Software:  
ARCS™ IVR/Web Interviewing Software



## Decision Analyst, Inc.

**Decision Analyst, Inc.**  
604 Avenue H East  
Arlington, TX 76011-3100  
Ph. 817-640-6166 or 800-ANALYSIS  
Fax 817-640-6567  
E-mail: jthomas@decisionanalyst.com  
www.decisionanalyst.com  
Jerry W. Thomas  
Software:  
STATS™

STATS™ 2000 is a software package for IBM-compatible PCs. The software: generates random numbers; calculates sample sizes; computes the mean; standard deviation; standard error, range for keyboard-entered data; determines the standard error of proportion; performs significance tests between two percentages from independent samples, or dependent samples; does significance tests between averages from independent samples; performs Chi-square analysis.  
(See advertisement on p. 49)

Decision Architects  
A Monitor Group Affiliate  
Two Canal Park  
Cambridge, MA 02141  
Ph. 617-252-2250  
Fax 617-761-3660  
E-mail: info@decisionarc.com  
www.decisionarc.com  
Software:  
MarketSight

Delphus, Inc.  
152 Speedwell Ave.  
Morristown, NJ 07960  
Ph. 973-267-9269  
Fax 973-285-9248  
E-mail: hans@delphus.com  
www.delphus.com  
H. Levenbach, President  
Software:  
PEER Planner for Windows  
WINXII  
Spreadsheet Forecaster

DESAN Marketresearch BV  
P.O. Box 10288  
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The Netherlands  
Ph. 31-20-620-15-89  
Fax 31-20-638-72-99  
E-mail: info@desan.nl  
www.desan.nl  
Andre Smit  
Software:  
IT CATI/CAPI

Digisoft Computers, Inc.  
369 Lexington Ave.  
New York, NY 10017  
Ph. 212-687-1810  
Fax 212-687-1781  
E-mail: sales@digisoft.com  
www.digisoft.com  
Andrew Davidson, Marketing Director  
Software:  
Telescript 5.2  
Super-Scripting

Drago Consulting Inc.  
131 D.W. Hwy., #233  
Nashua, NH 03060  
Ph. 603-483-2981  
Fax 603-483-2981  
E-mail: service@dragoweb.com  
www.dragoweb.com  
Software:  
Survey Stats  
SQL Convert

Easy Analytic Software, Inc.  
891 Oak Rd.  
P.O. Box 363  
Vineland, NJ 08362  
Ph. 856-691-9253  
Fax 856-696-2130  
Software:  
The Right Site - Advanced Editions  
The Right Site - Site Analysis  
The Right Site - Market Analysis  
EASI Mapping Plus Data  
MapPoint

e-Satisfy  
Formerly TARP  
1300 Wilson Blvd., Ste. 950  
Arlington, VA 22209  
Ph. 703-524-1456  
Fax 703-524-6374  
E-mail: info@e-satisfy.com  
www.e-satisfy.com  
Software:  
CRIS (Customer Response Information System)

## E-Tabs

**E-Tabs Ltd**  
Heather House  
Heather Gardens  
London NW11 9HS  
United Kingdom  
Ph. 44-20-8455-4665 or 888-823-8227 (U.S.)  
Fax 44-20-8731-9591  
E-mail: info@e-tabs.com  
www.e-tabs.com  
Benjamin Rietti  
Software:  
E-Tabs Professional Reader  
E-Tabs Lite Reader  
E-Tabs Writer  
E-Tabs Web Writer  
E-Tabs Web Reader

E-Tabs provide specialist software, consulting and services for the electronic delivery of survey reports to research firms and end-users. E-Tabs boosts the productivity of research professionals using fast indexing, automatic charting and integration with any

tabulation software. Used worldwide, E-Tabs software has become the industry standard for archiving and delivering research tabulations on PC networks, intranets and over the Web. (See advertisement on p. 41)

FIRM INC.  
Future Information Research Management Inc.  
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New York, NY 10019  
Ph. 646-756-2600  
Fax 646-756-2587  
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www.confirmit.com  
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**GENESYS Sampling Systems**  
565 Virginia Dr.  
Fort Washington, PA 19034-2706  
Ph. 800-336-7674 or 215-653-7100  
Fax 215-653-7115  
E-mail: gkennedy@m-s-g.com  
www.genesys-sampling.com  
Gregg Kennedy, Vice President  
Software:  
GENESYS Sampling Systems  
GENESYS-Plus  
GENESYS-ID

GENESYS allows you to design and generate random digit dialing (RDD) sample - completely on your computer, no modem needed. Geographic definitions as small as census tract/BG (e.g. national, state, county, DMA, MSA, ZIP code and area code/exchange). Targets samples based on over 20 demographic

variables. Create incidence and coverage estimates. PRIZM and congressional districts available. GENESYS-Plus/GENESYS-ID: Hardware/software/database systems for identifying and purging non-household and non-working numbers from RDD samples. (See advertisement on Inside Front Cover)

Geographic Data Technology, Inc.  
A Polk Company  
11 Lafayette St.  
Lebanon, NH 03766  
Ph. 800-331-7881 or 603-643-0330  
Fax 603-643-6808  
E-mail: info@gdt1.com  
www.geographic.com  
Software:  
DynaMap/Census/Series  
GDT Data

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(See advertisement on Inside Front Cover, p. 113)

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(See advertisement on p. 111)

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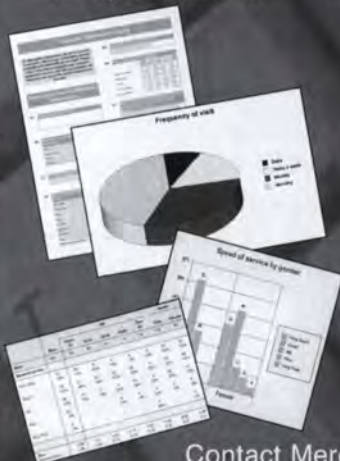
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(See advertisement on p. 115)

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## Computer Directed/Predictive Dialing

Computers for Marketing Corp. (CfMC) (Unix)  
 DESAN Marketresearch BV (Win)  
 Digisoft Computers, Inc. (Win)  
 Hearne Scientific Software Pty Ltd (Win)  
 Information Management Assoc., Inc. (IMA) (Win)  
 Marketing Systems Group (Win)  
 NIPO Software (Win)  
 PRO-T-S Telephony Systems (Win)  
 Pulse Train Ltd. (Win/Unix)  
 SPSS MR (Unix)  
 TelAthena Systems LLC (Win/Unix)  
 VOXCO Inc. (Win)

## Computer-Personal Interviewing (CAPI)

Americom Research, Inc. (Win)  
 The Analytical Group, Inc. (Win)  
 Apian Software, Inc. (Win)  
 Applied Decision Analysis LLC (Win)  
 Computers for Marketing Corp. (CfMC) (Win/Unix)  
 Comstat Research Corporation (Win/Unix)  
 CONVERSOFT (Axiom Software) (Win)  
 Creative Research Systems (Win)  
 Cybernetic Solutions - The Survey Software (Win)  
 DATAN, Inc. (Win/Unix)  
 DESAN Marketresearch BV (Win)  
 FIRM INC. (Win)  
 Hearne Scientific Software Pty Ltd (Win)  
 Peter Holmes SA/ASKIA (Win)  
 I & A Software A/S (Win)  
 Marketing Masters (Win)  
 Mercator Corporation (Win)  
 NEBU b.v. (Win)  
 NetRaker (Win/Mac/Unix)  
 Niche Design Group (Win/Mac/Unix)  
 NIPO Software (Win)  
 Opus Technologies, Inc. (Win)  
 Pulse Train Ltd. (Win)  
 QPSMR Limited (Win)  
 Raosoft, Inc. (Win/Unix)  
 Research Solutions (Win)  
 RONIN Corporation (Win)  
 Sawtooth Software, Inc. (Win)  
 Sawtooth Technologies (Win)  
 Senecio Software, Inc. (Win/Mac)  
 SPSS MR (Win)  
 Technos Systems, Inc. (Win)

Touch Base Computing (Win)  
VOXCO Inc. (Win)  
WebSurveyor Corporation (Win)

## Computer-Self-Administered Interviewing

Americom Research, Inc. (Win)  
**The Analytical Group, Inc. (Win)**  
**Apian Software, Inc. (Win)**  
Applied Decision Analysis LLC (Win)  
Beach Tech Corporation (Win)  
**Computers for Marketing Corp. (CfMC) (Win/Unix)**  
Comstat Research Corporation (Win/Unix)  
CONVERSOFT (Axiom Software) (Win)  
Creative Research Systems (Win)  
Cybernetic Solutions - The Survey Software (Win)  
**DATAN, Inc. (Win/Unix)**  
DESAN Marketresearch BV (Win)  
FIRM INC. (Win)  
Hearne Scientific Software Pty Ltd (Win)  
Marketing Masters (Win)  
NetRaker (Win/Mac/Unix)  
NIPO Software (Win)  
Opus Technologies, Inc. (Win)  
**Pine Company (Win)**  
QPSMR Limited (Win)  
Raosoft, Inc. (Win/Unix)  
Research Solutions (Win)  
RONIN Corporation (Win)  
**Sawtooth Software, Inc. (Win)**  
**Sawtooth Technologies (Win)**  
Senecio Software, Inc. (Win/Mac)  
**SPSS MR (Win)**  
Technos Systems, Inc. (Win)  
Touch Base Computing (Win)  
VOXCO Inc. (Win)  
WebSurveyor Corporation (Win)

## Computer-Telephone Interviewing (CATI)

Americom Research, Inc. (Win)  
**The Analytical Group, Inc. (Win)**  
**Apian Software, Inc. (Win)**  
**Computers for Marketing Corp. (CfMC) (Win/Unix)**  
CONVERSOFT (Axiom Software) (Win)  
Creative Research Systems (Win)  
Cybernetic Solutions - The Survey Software (Win)  
DESAN Marketresearch BV (Win)  
Digisoft Computers, Inc. (Win)  
Hearne Scientific Software Pty Ltd (Win)  
Peter Holmes SA/ASKIA (Win)  
I & A Software A/S (Win)  
Marketing Masters (Win)  
**Mercator Corporation (Win)**  
NEBU b.v. (Win)  
NIPO Software (Win)  
Opus Technologies, Inc. (Win)  
**Pulse Train Ltd. (Win/Unix)**  
QPSMR Limited (Win)  
Raosoft, Inc. (Win/Unix)  
Research Solutions (Win)  
RONIN Corporation (Win)  
Saja Software, Inc. (Win)  
**Sawtooth Software, Inc. (Win)**  
**Sawtooth Technologies (Win)**  
Senecio Software, Inc. (Mac)  
**SPSS MR (Unix)**  
StatPac, Inc. (Win)  
TelAthena Systems LLC (Win/Unix)

Touch Base Computing (Win)  
VOXCO Inc. (Win)  
WebSurveyor Corporation (Win)

## Conjoint Analysis & Choice-Based Modeling

Applied Decision Analysis LLC (Win)  
Bretton-Clark (Win)  
Cognos Corporation (Win)  
Hearne Scientific Software Pty Ltd (Win)  
MapInfo Corporation (Win/Unix)  
Market Advantage Consulting & Software (Win)  
**MarketVision Research® (Win)**  
Mathematical Data Systems, Inc. (Win)  
Moskowitz Jacobs Inc. (Win)  
Niche Design Group (Win)  
NIPO Software (Win)  
RONIN Corporation (Win)  
Salford Systems (Win/Unix)  
SAS Institute (Win/Unix)  
**Sawtooth Software, Inc. (Win)**  
**Sawtooth Technologies (Win)**  
**SPSS MR (Win/Mac)**  
WebSurveyor Corporation (Win)

## Crosstabulation Software

**The Analytical Group, Inc. (Win)**  
**Apian Software, Inc. (Win)**  
The Arbitron Company (Win)  
AutoData Systems (Win)  
Beach Tech Corporation (Win)  
**Computers for Marketing Corp. (CfMC) (Win/Unix)**  
Creative Research Systems (Win)  
Cybernetic Solutions - The Survey Software (Win)  
Cytel Software (Win/Unix)  
**DATAN, Inc. (Win/Unix)**  
**Dataxiom Software, Inc. (Win)**  
DESAN Marketresearch BV (Win)  
Drago Consulting Inc. (Win)  
FIRM INC. (Win)  
Hearne Scientific Software Pty Ltd (Win)  
Manugistics, Inc. (Win)  
Marketing Masters (Win)  
**Mercator Corporation (Win)**  
**Microtab, Inc. (Win)**  
NCSS (Win)  
NetRaker (Win/Mac/Unix)  
NIPO Software (Win)  
**PAI-Productive Access, Inc. (Win)**  
Point-of-View™ Survey Systems (Win)  
Power Knowledge Software (Mac)  
P-STAT, Inc. (Win/Unix)  
**Pulse Train Ltd. (Win)**  
QPSMR Limited (Win)  
QQQ Software, Inc. (Win/Unix)  
Quick-Trak Database Solutions (Win)  
Raosoft, Inc. (Win/Unix)  
Research Dynamics, Inc. (Win)  
Research Solutions (Win)  
RONIN Corporation (Win)  
Saja Software, Inc. (Win)  
SAS Institute (Win/Unix)  
Senecio Software, Inc. (Mac)  
Irwin P. Sharpe & Associates (Win)  
Spectra Marketing Systems, Inc. (Win)  
Spring Systems (Win)  
**SPSS MR (Win/Unix)**  
StatPac, Inc. (Win)  
Suburban Associates (Win)  
Touch Base Computing (Win)

Trewhella, Cohen & Ar buckle, Inc. (T/C/A) (Win)  
 The Uncle Group, Inc. (Win)  
 VOXCO Inc. (Win)  
 WebSurveyor Corporation (Win)  
 Jan Werner Data Processing (Win/Unix)

## Data Archiving/Delivery Software

ATP Limited (Win)  
**DATAN, Inc. (Win/Unix)**  
**E-Tabs Ltd (Win/Mac/Unix)**  
 FIRM INC. (Win)  
 Mathematical Data Systems, Inc. (Win)  
 Spectra Marketing Systems, Inc. (Win)  
**SPSS MR (Win)**  
 WebSurveyor Corporation (Win)

## Data Entry Software

**The Analytical Group, Inc. (Win)**  
 AutoData Systems (Win)  
 Beach Tech Corporation (Win)  
 Cardiff Software (Win)  
**Computers for Marketing Corp. (CFMC) (Win)**  
 CONVERSOF (Axiom Software) (Win)  
 Creative Research Systems (Win)  
 Cybernetic Solutions - The Survey Software (Win)  
 Cytel Software (Win)  
 Data Vision Research, Inc. (Win)  
**DATAN, Inc. (Win/Unix)**  
 DBM Associates (Win)  
 DESAN Marketresearch BV (Win)  
 FIRM INC. (Win)  
 Hearne Scientific Software Pty Ltd (Win)  
 Marketing Masters (Win)  
 MDSS (Win)  
**Mercator Corporation (Win)**  
**Microtab, Inc. (Win)**  
 NCS (Win)  
 NIPO Software (Win)  
 Optimum Solutions Corp. (Win)  
 Power Knowledge Software (Mac)  
 Principia Products, Inc. (Win)  
 P-STAT, Inc. (Win/Unix)  
**Pulse Train Ltd. (Win)**  
 QPSMR Limited (Win)  
 ReadSoft, Inc. (Win/Mac/Unix)  
 Research Solutions (Win)  
 RONIN Corporation (Win)  
 Saja Software, Inc. (Win)  
**Sawtooth Software, Inc. (Win)**  
 Scantron Surveys (Win)  
 Service Measurement Group, Inc. (Win)  
 Irwin P. Sharpe & Associates (Win)  
 Spring Systems (Win)  
**SPSS MR (Win/Unix)**  
 StatPac, Inc. (Win)  
 StatSoft, Inc. (Win/Mac)  
 William Steinberg Consultants, Inc. (Win)  
 Suburban Associates (Win)  
 Technos Systems, Inc. (Win)  
 Touch Base Computing (Win)  
 The Uncle Group, Inc. (Win)  
 Viking Software Services, Inc. (Win/Unix)  
 VOXCO Inc. (Win)

## Database Management Programs

ATP Limited (Win)  
 AutoData Systems (Win)  
 Beach Tech Corporation (Win)  
 Claritas Inc. (Win)

Data Vision Research, Inc. (Win)  
**DATAN, Inc. (Win/Unix)**  
 DBM Associates (Win)  
 Information Management Assoc., Inc. (IMA) (Win)  
 MapInfo Corporation (Win/Unix)  
 MarketMiner, Inc. (Win)  
 Mathematical Data Systems, Inc. (Win)  
 MDSS (Win)  
 NIPO Software (Win)  
 P-STAT, Inc. (Win/Unix)  
 Raosoft, Inc. (Win/Unix)  
 RONIN Corporation (Win)  
 Sagent Technologies, Inc. (Win/Unix)  
 Spring Systems (Win)  
 StatSoft, Inc. (Win)  
 TelAthena Systems LLC (Win/Unix)  
 WebSurveyor Corporation (Win)

## Decision Support Software

Applied Decision Analysis LLC (Win)  
 AutoData Systems (Win)  
 Business Forecast Systems (Win)  
 Caliper Corporation (Win)  
 Cognos Corporation (Win)  
**DATAN, Inc. (Win/Unix)**  
 Delphus, Inc. (Win)  
 Easy Analytic Software, Inc. (Win)  
 FIRM INC. (Win)  
**Fleetwood Group, Inc. (Win)**  
 Hearne Scientific Software Pty Ltd (Win)  
 MapInfo Corporation (Win/Unix)  
 Market Advantage Consulting & Software (Win)  
 MarketMiner, Inc. (Win)  
 Media Market Reports, Inc. (Win)  
 NFO MarketMind Technologies (Win)  
 P-STAT, Inc. (Win/Unix)  
 Pulse Analytics, Inc. (Win)  
 Raosoft, Inc. (Win/Unix)  
 Spectra Marketing Systems, Inc. (Win)  
 Spring Systems (Win)  
**SPSS MR (Win)**  
 Tactician Corporation (Win)

## Demographic Database Software

Able Software Corp. (Win)  
 Beach Tech Corporation (Win)  
 CACI Marketing Systems (Win)  
 Claritas Inc. (Win)  
**DATAN, Inc. (Win/Unix)**  
 DBM Associates (Win)  
 Easy Analytic Software, Inc. (Win)  
 FIRM INC. (Win)  
 MapInfo Corporation (Win/Unix)  
 NCS (Win)  
 QQQ Software, Inc. (Win/Unix)  
 RONIN Corporation (Win)  
 Sagent Technologies, Inc. (Win/Unix)  
 Sammamish Data Systems (Win)  
 Spectra Marketing Systems, Inc. (Win)  
 Tactician Corporation (Win)  
 Tetrad Computer Applications, Ltd. (Win)  
 WebSurveyor Corporation (Win)

## Disk-by-Mail Interviewing

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

## Computers for Marketing Corp. (CfMC) (Win/Unix)

Creative Research Systems (Win)  
Cybernetic Solutions - The Survey Software (Win)  
Marketing Masters (Win)  
Marketing Metrics, Inc. (Win)  
NCS (Win)  
NIPO Software (Win)  
Opus Technologies, Inc. (Win)  
Perseus Development Corporation (Win)  
QPSMR Limited (Win)  
Raosoft, Inc. (Win)  
Research Solutions (Win)  
Saja Software, Inc. (Win)  
**Sawtooth Software, Inc. (Win)**  
**Sawtooth Technologies (Win)**  
Senecio Software, Inc. (Win/Mac)  
William Steinberg Consultants, Inc. (Win)  
Touch Base Computing (Win)  
VOXCO Inc. (Win)

## Experimental Design

Americom Research, Inc. (Win)  
**Dataxiom Software, Inc. (Win)**  
Hearne Scientific Software Pty Ltd (Win)  
**Mercator Corporation (Win)**  
Moskowitz Jacobs Inc. (Win)  
NCSS (Win)  
P-STAT, Inc. (Win)  
Pulse Analytics, Inc. (Win)  
RONIN Corporation (Win)  
**Sawtooth Software, Inc. (Win)**  
Spring Systems (Win)  
**SPSS MR (Win)**  
StatPoint, LLC (Win)  
StatSoft, Inc. (Win)  
WebSurveyor Corporation (Win)

## Field Management Software

Americom Research, Inc. (Win)  
**The Analytical Group, Inc. (Win)**  
ATP Limited (Win)  
Cognos Corporation (Win)  
**Computers for Marketing Corp. (CfMC) (Win)**  
KGA (Win)  
MapInfo Corporation (Win/Unix)  
NIPO Software (Win)  
**SPSS MR (Win/Unix)**  
Tactician Corporation (Win)  
WebSurveyor Corporation (Win)

## Focus Group Management

CLT Research Associates Inc. (Win/Mac)  
**Computers for Marketing Corp. (CfMC) (Win/Unix)**  
MDSS (Win)

## Focus Group/Qualitative/Verbatim Analysis

The Arbitron Company (Win)  
**Computers for Marketing Corp. (CfMC) (Win/Unix)**  
Comstat Research Corporation (Win/Unix)  
**Fleetwood Group, Inc. (Win)**  
Marketing Metrics, Inc. (Win)  
NIPO Software (Win)  
Raosoft, Inc. (Win)  
RONIN Corporation (Win)

Service Measurement Group, Inc. (Win)  
**SPSS MR (Win)**  
StatPac, Inc. (Win)  
VOXCO Inc. (Win)

## Internet/Web Interviewing

Americom Research, Inc. (Win)  
**The Analytical Group, Inc. (Win)**  
**Apian Software, Inc. (Win)**  
Beach Tech Corporation (Win)  
CLT Research Associates Inc. (Win/Mac)  
**Computers for Marketing Corp. (CfMC) (Win)**  
Comstat Research Corporation (Win/Mac/Unix)  
Creative Research Systems (Win)  
DBM Associates (Win)  
FIRM INC. (Win/Mac/Unix)  
Hearne Scientific Software Pty Ltd (Win)  
Peter Holmes SA/ASKIA (Win)  
Informative, Inc. (Win/Mac/Unix)  
Inquisite, Inc. (Win)  
Manta Corporation (Win)  
MapInfo Corporation (Win/Unix)  
Marketing Masters (Win/Mac/Unix)  
Mathematical Data Systems, Inc. (Win)  
**Mercator Corporation (Win)**  
MessageMedia (Win)  
MSInteractive (Win)  
NEBU b.v. (Win)  
NetRaker (Win/Mac/Unix)  
NetReflector.com, Inc. (Win)  
Niche Design Group (Win/Mac/Unix)  
NIPO Software (Win)  
Opus Technologies, Inc. (Win)  
Perseus Development Corporation (Win)  
**Pine Company (Win)**  
Point-of-View™ Survey Systems (Win/Mac)  
Principia Products, Inc. (Win)  
**Pulse Train Ltd. (Win)**  
Raosoft, Inc. (Win/Unix)  
Research Solutions (Win/Mac)  
RONIN Corporation (Win)  
**Sawtooth Software, Inc. (Win/Unix)**  
**Sawtooth Technologies (Win)**  
Scantron Surveys (Win)  
Senecio Software, Inc. (Win/Mac/Unix)  
**SPSS MR (Win)**  
StatPac, Inc. (Win)  
SurveySite Inc. (Win)  
SurveyWriter® (Win/Mac/Unix)  
Touch Base Computing (Win)  
VOXCO Inc. (Win)  
WebSurveyor Corporation (Win)

## Name Generation

Americom Research, Inc. (Win)  
The Namestormers (Win)

## Neural Networks

AutoData Systems (Win)  
Hearne Scientific Software Pty Ltd (Win)  
Mathematical Data Systems, Inc. (Win)  
**SPSS MR (Win/Mac)**  
StatSoft, Inc. (Win)

## OCR/ICR/OMR Scanning Systems

AutoData Systems (Win)  
Cardiff Software (Win)

**Mercator Corporation (Win)**

NCS (Win)

Optimum Solutions Corp. (Win)

**Pine Company (Win)**

Principia Products, Inc. (Win)

**Pulse Train Ltd. (Win)**

ReadSoft, Inc. (Win)

Research Solutions (Win)

SAS Institute (Win/Unix)

## Perceptual Mapping

Bretton-Clark (Win)

Information Management Assoc., Inc. (IMA) (Win)

MapInfo Corporation (Win/Unix)

Market Advantage Consulting &amp; Software (Win)

Mathematical Data Systems, Inc. (Win)

NCSS (Win)

RONIN Corporation (Win)

SAS Institute (Win/Unix)

**Sawtooth Software, Inc. (Win)**

Spring Systems (Win)

**SPSS MR (Win)**

StatPac, Inc. (Win)

Tactician Corporation (Win)

**WRC Research Systems, Inc. (Win)**

## Questionnaire Design

**Apian Software, Inc. (Win)**

AutoData Systems (Win)

Beach Tech Corporation (Win)

Cardiff Software (Win)

**Computers for Marketing Corp. (CfMC) (Win/Unix)**

CONVERSOFT (Axiom Software) (Win)

Creative Research Systems (Win)

Cybernetic Solutions - The Survey Software (Win)

**DATAN, Inc. (Win/Unix)**

DBM Associates (Win)

**Decision Analyst, Inc. (Win)**

FIRM INC. (Win)

Peter Holmes SA/ASKIA (Win)

Manta Corporation (Win)

Marketing Masters (Win/Mac/Unix)

Marketing Metrics, Inc. (Win)

**Mercator Corporation (Win)**

NEBU b.v. (Win)

NetRaker (Win/Mac/Unix)

Niche Design Group (Win/Mac/Unix)

NIPO Software (Win)

Opus Technologies, Inc. (Win)

Perseus Development Corporation (Win)

Point-of-View™ Survey Systems (Win)

Power Knowledge Software (Mac)

**Pulse Train Ltd. (Win)**

QPSMR Limited (Win)

Quick-Trak Database Solutions (Win)

Raosoft, Inc. (Win/Unix)

Research Solutions (Win)

RONIN Corporation (Win)

Saja Software, Inc. (Win)

**Sawtooth Technologies (Win)**

Scantron Surveys (Win)

Senecio Software, Inc. (Win/Mac/Unix)

**SPSS MR (Win/Unix)**

StatPac, Inc. (Win)

SurveyWriter® (Win/Mac/Unix)

Techneos Systems, Inc. (Win)

Touch Base Computing (Win)

WebSurveyor Corporation (Win)

William Steinberg Consultants, Inc. (Win)

## Sales Database

Beach Tech Corporation (Win)

**DATAN, Inc. (Win/Unix)**

MapInfo Corporation (Win/Unix)

SAS Institute (Win/Unix)

Tactician Corporation (Win)

## Sampling Systems/Software

**Affordable Samples, Inc. (Win)**

ASDE Inc., PC Survey Sampler (Win)

ATP Limited (Win)

**Computers for Marketing Corp. (CfMC) (Win/Unix)**

Cybernetic Solutions - The Survey Software (Win)

**Dataxiom Software, Inc. (Win)**

DBM Associates (Win)

**Decision Analyst, Inc. (Win)****GENESYS Sampling Systems (Win)**

Hearne Scientific Software Pty Ltd (Win)

**Marketing Systems Group (Win)**

NIPO Software (Win)

**Polk (Win)**

P-STAT, Inc. (Win/Unix)

**Sawtooth Technologies (Win)**

SDR Sampling Services (Win)

**SPSS MR (Win/Unix)****Survey Sampling, Inc. (Win)**

SurveySite Inc. (Win)

Touch Base Computing (Win)

WebSurveyor Corporation (Win)

## Structural Equation Modeling/Path

Hearne Scientific Software Pty Ltd (Win)

Mathematical Data Systems, Inc. (Win)

Multivariate Software, Inc. (Win/Mac/Unix)

RONIN Corporation (Win)

SAS Institute (Win/Unix)

Spectra Marketing Systems, Inc. (Win)

StatSoft, Inc. (Win)

## Times Series Analysis

AutoData Systems (Win)

Business Forecast Systems (Win)

Cognos Corporation (Win)

**Dataxiom Software, Inc. (Win)**

Delphus, Inc. (Win)

FIRM INC. (Win)

Hearne Scientific Software Pty Ltd (Win)

Manugistics, Inc. (Win)

Mathematical Data Systems, Inc. (Win)

NCS (Win)

NCSS (Win)

P-STAT, Inc. (Win/Unix)

RONIN Corporation (Win)

Spring Systems (Win)

**SPSS MR (Win/Unix)**

StatPoint, LLC (Win/Mac/Unix)

StatSoft, Inc. (Win/Mac)

Techtel Corporation (Win)

# Software Title Cross-Index

## A

Abase, Advanced Data Research, Inc.  
**ACA System, Sawtooth Software, Inc.**  
ACE Indicators, Claritas Inc.  
ACORN, CACI Marketing Systems  
ActiveStats, Research Solutions  
AdverTrax, Marketing Strategy & Planning  
Arbitrends, The Arbitron Company  
ARCS™ IVR/Web Interviewing Software, DBM Associates  
ARGUS Perceptual Mapper, Spring Systems  
**Arthur, The Analytical Group, Inc.**  
ASDE Survey Sampler - Canada, ASDE Inc., PC Survey Sampler  
ASDE Survey Sampler - USA, ASDE Inc., PC Survey Sampler  
AskAnywhere, Senecio Software, Inc.  
Askia Analyse, Peter Holmes SA/ASKIA  
Askia CAPI (face), Peter Holmes SA/ASKIA  
Askia CATI (voice), Peter Holmes SA/ASKIA  
Askia Questionnaire, Peter Holmes SA/ASKIA  
Askia Web, Peter Holmes SA/ASKIA  
**Audience Response System, Fleetwood Group, Inc.**  
AutoData Scannable Office, AutoData Systems  
AutoData SDK, AutoData Systems  
AutoData Survey Plus 2000, AutoData Systems  
AutoMerge Publisher, Cardiff Software  
AWS-Analyst Work Station, Management Science Associates, Inc.

## B

Balanced Scorecard, Mathematical Data Systems, Inc.  
**Bellview CAPI, Pulse Train Ltd.**  
**Bellview CATI, Pulse Train Ltd.**  
**Bellview Scan, Pulse Train Ltd.**  
**Bellview Web, Pulse Train Ltd.**  
Blaise, Westat, Inc.  
BrandFX, Spectra Marketing Systems, Inc.  
**BrandMap 4.1, WRC Research Systems, Inc.**  
**BrandProfiler 1.1, WRC Research Systems, Inc.**  
Bridger, Bretton-Clark  
BusinessWeb, Management Science Associates, Inc.

## C

Canadian Advantage, Spectra Marketing Systems, Inc.  
**CAPI Collect, Apian Software, Inc.**  
CART®, Salford Systems  
Catalog of software products, Cole-Parmer Instrument Co.  
**CBC System, Sawtooth Software, Inc.**  
**CBC/HB Module, Sawtooth Software, Inc.**  
**CCA System, Sawtooth Software, Inc.**  
Centrus™, Sagent Technologies, Inc.  
CfMC/NIPO Script Composer, NIPO Software  
C-Gen - Customer Survey Generator, William Steinberg Consultants, Inc.  
**Ci3 for Windows, Sawtooth Technologies**  
**Ci3 System, Sawtooth Software, Inc.**  
**Clementine, SPSS MR**  
Cognos Scenario, Cognos Corporation  
Compass Analyzer, Claritas Inc.  
CONFIRM, FIRM INC.  
Conjoint Analyzer, Bretton-Clark  
Conjoint Designer, Bretton-Clark  
Conjoint Linmap, Bretton-Clark  
Conjoint Segmenter, Bretton-Clark  
CONVERSO CAPI, CONVERSOFT (Axiom Software)  
CONVERSO CASI, CONVERSOFT (Axiom Software)  
CONVERSO CATI, CONVERSOFT (Axiom Software)  
**COSI, Computers for Marketing Corp. (CfMC)**  
CRIS (Customer Response Information System), e-Satisfy  
Custom Applications, Datanetics  
**Custom Software Packages, Pine Company**  
**CVA System, Sawtooth Software, Inc.**

Cyber EDGE, Information Management Assoc., Inc. (IMA)

## D

Data Desk, Research Solutions  
Data Entry Program, P-STAT, Inc.  
DataFit 7.1, Oakdale Engineering  
**Direct.Collect, Apian Software, Inc.**  
DPL Decision Analysis Software, Applied Decision Analysis LLC  
Dub InterViewer, NEBU b.v.  
DynaMap/Census/Series, Geographic Data Technology, Inc.

## E

EASI Mapping Plus Data, Easy Analytic Software, Inc.  
The EDGE Software System, Information Management Assoc., Inc. (IMA)  
Eform, Beach Tech Corporation  
eListen, Scantron Surveys  
Entryware™, Techneos Systems, Inc.  
EQS Structural Equations Modeling Software, Multivariate Software, Inc.  
E-Scrub, PDPC, Ltd.  
**E-Tabs Lite Reader, E-Tabs Ltd**  
**E-Tabs Professional Reader, E-Tabs Ltd**  
**E-Tabs Web Reader, E-Tabs Ltd**  
**E-Tabs Web Writer, E-Tabs Ltd**  
**E-Tabs Writer, E-Tabs Ltd**  
Eyes & Hands, ReadSoft, Inc.  
EZSurvey 2000 for the Internet, Raosoft, Inc.

## F

FAQSS, Optimum Solutions Corp.  
**FASTAB Ad Hoc Tabulation, DATAN, Inc.**  
Feedback Manager, Service Measurement Group, Inc.  
The Field System, KGA  
The Field System 2000, KGA  
Flo - Stat, Senecio Software, Inc.  
Forecast Pro, Business Forecast Systems  
Forecast Pro Unlimited, Business Forecast Systems  
Forecast Pro XE, Business Forecast Systems  
4THOUGHT, Cognos Corporation  
Fuzzy Mail Merge, PDPC, Ltd.

## G

GDT Data, Geographic Data Technology, Inc.  
**GENESYS Sampling Systems, GENESYS Sampling Systems**  
**GENESYS Sampling Systems, Marketing Systems Group**  
**GENESYS-ID, GENESYS Sampling Systems**  
**GENESYS-Plus, GENESYS Sampling Systems**  
GeoSight, Sammamish Data Systems  
**Gold, Microtab, Inc.**  
**Group Decision Support, Fleetwood Group, Inc.**

## H

**HB-Reg, Sawtooth Software, Inc.**  
Headliner, The Namestormers  
HTML + Forms, Cardiff Software  
Hyper Q I-Net, Americom Research, Inc.  
Hyper Q Lite, Americom Research, Inc.  
Hyper Q Phone, Americom Research, Inc.  
Hyper Q Plus, Americom Research, Inc.

## I

IDA - Infosense Data Automation, CAMO/InfoSense  
IdeaMap@Wizard™, Moskowitz Jacobs Inc.  
ImagEntry, Viking Software Services, Inc.

iMark, Claritas Inc.  
 iMark Express, Claritas Inc.  
**In2form Designer, SPSS MR**  
**In2quest for CAPI, SPSS MR**  
 InfoMark, Claritas Inc.  
 InfoPop, Marketing Strategy & Planning  
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## Trade Talk

By Joseph Rydholm, QMRR editor

# Moderator tells all!

**F**ocus groups are a strange mixture of planning and serendipity. For all the work that goes into choosing a facility, recruiting the respondents, and writing the discussion guide, you just never know what will happen once the talking begins. Respondents may confirm all of your worst fears, validate your hunches, or take the discussion in directions you never thought you'd go — all in the same two-hour span.

In her new book, *The Mirrored Window: Focus Groups from a Moderator's Point of View*, veteran moderator Judith Langer tells what it's like to go through every step of the often-unpredictable focus group process.

Early in the book she provides an explanation for the enduring power of the focus group. "Seeing and hearing consumers only a few feet away has an effect that no set of statistics or written reports alone can have. It makes the abstract real because it is human and individual. Qualitative research offers not just an intellectual comprehension of consumers, but a vivid, visceral recognition that affects on a very deep level how companies see, feel about, and deal with their customers from then on."

Having shown us *why* focus groups are conducted, she then devotes the rest of the book to showing us *how* they are conducted. With humor and clarity, she covers the entire focus group process, from the decision to do groups to choosing a moderator, defining the research tasks, and analyzing the results.

She gives the reader some great food for thought along the way:

- Remember that, in many cases, the focus group participants are just plain folks, so they won't get your marketing-speak. In other words, to use Langer's examples, don't have the moderator ask questions about the "aspirational images" associated with relief from a migraine or about the "implementation" of a new office product.

- Some clients may wish to withhold background data on the project from the moderator for security reasons, passing information along only on a need-to-know basis. But keeping them in the dark about the true end use of the research findings may keep the moderator from using all of his or her interviewing and analysis skills.

- Clients must realize that they may not like what they hear in the groups. And moderators must be sensitive to the fact that it may be hard for the creative team, for example, to hear their ad concepts ripped to shreds.

The chapter "Moderating: The Listening Loop" is an in-depth look into the mind of the moderator, how she tackles the interviewing process, the phrasing of questions, the analysis of respondents' answers, and dealing with problem participants.

Langer also includes an insightful chapter on techniques useful for going beyond the basic interviewing approaches. And the section on analyzing and presenting the results is also very detailed, offering nuts-and-bolts directions on everything from report organization to content dos and don'ts.

Equally illuminating is the section on the logistics of the focus group process (setting up the facility, recruiting, screening) which should give clients a good idea of the many things that must go right for a focus group session to run smoothly.

It may be too much to ask someone who only occasionally sits in on a focus group to read this book. But if you use focus groups frequently, or plan to start using them more, and want to know how a skilled moderator does her job, look into *The Mirrored Window*. **TM**

*The Mirrored Window: Focus Groups from a Moderator's Point of View* (256 pages, \$49.95), by Judith Langer, is published by Paramount Market Publishing. For more information call 888-787-8100 or visit [www.paramountbooks.com](http://www.paramountbooks.com).

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