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Marketing Research Review

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June 2001

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- Conjoint analysis in pharmaceutical marketing research
- A paradigm for researching new drugs
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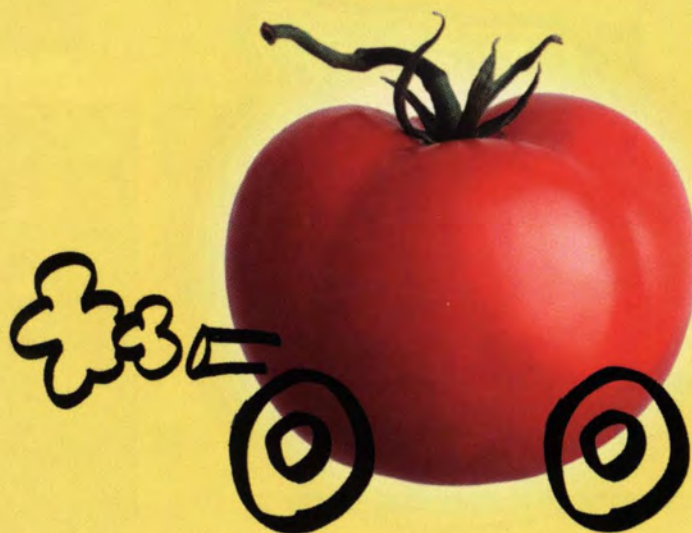
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## Summer travelers take to the road, not the air

The economy may be slowing down, but travelers are gearing up for their summertime retreats. And, in choosing their mode of travel, many may abandon the skyways for the



highways. In a recent online study conducted by Davidson-Peterson Associates, a Kennebunk, Maine, research firm, warm-season travelers indicated that while most will vacation as much as last year (if not more), a significant number are less inclined to travel by air.

The April online survey, which polled 2,221 Americans who travel in the spring and summer, revealed that 79 percent anticipate taking as many (or more) trips as they did last year. And, in talking about their mode of transport, more than one third (39 percent) expect to take fewer leisure trips by plane, whereas only 17 percent indicate they will cutback on car trips.

The study is based on an Intertrak poll, a monthly national online omnibus service of Digital Research, Inc./Davidson-Peterson Associates (DRI/DPA). The total sample for April's Intertrak wave consisted of 2,998 completed online responses, made up of male and female adults, 18 years of age and older. The respondents are members of DRI's

Consumer Technology Panel, an online panel of U.S. households that reflect the Internet population at large. A random sample of panel members was invited to complete the questionnaire. The survey was in the field from April 11-17. Completed surveys were weighted to ensure accurate and reliable representation of the total U.S. Internet population. For more information visit [www.dpaonline.com](http://www.dpaonline.com).

## Consumers in favor of ads for prescription drugs

Fifty-one percent of consumers report prescription (Rx) drug advertising keeps them informed of available Rx treatments, according to information released by The NPD Group, a

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## Health insurance shoppers seek more than just lowest premium

HealthInsurance.com, a Los Angeles company that helps individuals and small businesses access health insurance for themselves and their employees, has found that the vast majority of online health insurance shoppers are looking for more than the lowest premium when selecting a health insurance policy. HealthInsurance.com's



consumer research also found that nearly 70 percent of its customers were actively seeking health insurance products, either to get a competitive quote and/or buy insurance online.

Other key findings from the survey included:

- Over 60 percent of site visitors have found it some-

what or very difficult to find a traditional offline health insurance broker to service their needs.

- Nearly 70 percent of customers were looking for quotes from carriers or were ready to buy insurance at the time of their visit. Accordingly, two-thirds of customers with insurance had policies set to expire in one to three months.
- 52 percent of shoppers currently did not have insurance.

"While finding affordable coverage is still the number one concern of our shoppers, the vast majority are looking for reputable carriers and a solid set of benefits to cover needed medical expenses. Consumers are looking to the Internet to find assistance in selecting the best health plan to meet their needs," says Bob Darin, chief operating officer of HealthInsurance.com. "While we found that getting instant quotes and the ability to compare benefits are very important, we also found that our customers look at the company behind the Web site — one that can provide experienced, licensed agent support and that has a long history serving customers."

HealthInsurance.com partnered with Insiteful Surveys, Garland, Texas, to conduct and analyze the survey results. The survey was based on the responses of over 500 individual and small business site visitors in April 2001. For more information, please go to [www.healthinsurance.com](http://www.healthinsurance.com).



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## Names of Note

**May Yick** has joined Redwood Shores, Calif.-based research firm *Cheskin* as strategic director.

**Rudy Nadilo** has resigned as chairman and CEO of Wilton, Conn.-based research firm *Greenfield Online, Inc.* **Dean Wiltse** has been named CEO and **Peter Sobiloff** has been named chairman.

**Nancy Lucas** has been promoted to senior vice president of research for Atlanta-based *TBS Superstation* and *Turner South*.

**Carolyn J. Olson**, owner and president of Minneapolis-based *C.J. Olson Market Research*, was honored by the National Association of Women Business Owners (NAWBO) in April. The Minnesota chapter of NAWBO presented her with the Lifetime Achievement Award for her contributions over the years to other women business owners.

**Dan Coates** has joined *SPSS MR*, Chicago, as sales and marketing direc-

tor of the firm's newly formed application service provider division.

New York-based *CLT Research* has named **David R. Kalmar** senior vice president, client services, and **Steven Marks** has been appointed vice president, business development – business-to-business and Internet research. In addition, **Deborah Campbell** has been promoted to senior vice president, client services, and **Andrea Brecker** and **Alka Gupta** have been promoted to vice president.

**Mike Sauerma**n has joined Menlo Park, Calif., research firm *Knowledge Networks* as vice president, custom research.

**Basil Maniotes** has joined *Eagle Research* as quantitative research supervisor in the Denver office.

*Arbitron Inc.*, New York, has expanded its Portable People Meter (PPM) marketing team with a new addition to the team and two promotions. **Kevin Patrick Smith** has been

appointed senior vice president, cable services and PPM business development. In addition, **Les Tolchin** has been promoted to senior vice president, PPM business development, and **Jay Guyther** has been promoted to senior vice president, international PPM marketing. Separately, **Carol Hanley** has been named vice president, sales, advertiser/agency services.

Stamford, Conn., research firm *InsightExpress* has named **Lee Smith** chief operating officer.

*SPSS Inc.*, Chicago, has named **Tom Maxfield** vice president of information technologies and services.

**Bonnie Breslauer** has been named senior vice president in charge of sales and marketing at *LightspeedResearch.com*, Basking Ridge, N.J.

*RDD Inc.*, a Portland, Ore., research firm, has added **Raul Cordova**, **Samette Gilbert**, **Juli Ricken**, and **Danielle Schooley** as field managers at its new call center in Las Cruces, N.M. The firm has also named **Mark Ignowski** as director of information technology.

**Heidi Zalduondo** has been named senior qualitative research director of the Roper/Langer Qualitative division of *Roper Starch Worldwide*, New York.

**Karen Flannery** has been named account services manager in the Chicago sales office of *Interviewing Service of America*, Van Nuys, Calif. The firm has also named **Mark Sullivan** phone center manager at its Lancaster, Calif., location.

**Mindy Guerin** has joined the team of moderators at *Doyle Research Associates*, Chicago.

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## Roper looks at role of Internet in reaching physicians

New York research firm Roper Starch Worldwide plans to launch a study on how best to integrate the Internet with detailing, advertising and other marketing initiatives aimed at physicians. The results, broken out by physician specialty, will be available in September.

"The pharmaceutical industry spends billions on in-person detailing," says Roper Starch senior vice president Staats Abrams. "If the Internet could be used at times to reach physicians more efficiently, the cost-savings could be enormous. Yet, it is estimated that only one in three physicians use the Web to gain data needed to improve their practice. We want to learn what would spur more physicians to start turning to the Net to meet their information needs."

Called "Physicians and the Internet," the study will identify and quantify the needs for different types of information, perceptions of available information sources, and attitudinal and physical barriers to Internet usage among all physicians practicing in the U.S. It will also examine interest in specific new online tools and applications and seek to make short-term forecasts of Internet penetration by specialty. For more information call Curt Johnson at 212-455-4988 or visit [www.ropers.com](http://www.ropers.com).

## Database of bank locations from Spatial Insights

Spatial Insights, Inc., a Vienna, Va., geographic information services company, has completed a nationwide database of bank locations, attributed with deposit balance. Leveraging continually updated bank and savings deposit balance data, Spatial Insights geo-

graphically referenced and summarized more than 84,000 branches and offices of FDIC-insured institutions. In response to industry need, the data are available packaged in two data products: Bank Location Data and Summary Deposit Data.

The Bank Location Data provide one geocoded record for each financial institution. Attribute fields include total deposit balance, bank charter class and type, as well as locational information such as address, latitude/longitude, and block group identifier.

In developing the Summary Deposit Data, Spatial Insights enhanced the point data by creating aggregations by useful Census and postal geographies including ZIP code, county, and MSA (metropolitan statistical area). Requests for data summarized by custom client-defined boundaries are also welcomed. In addition to summarizing the bank totals, Spatial Insights has also calculated the number of financial institutions and deposit amounts for each of six bank charter classes: three commercial, two savings, and one foreign-chartered.

Both data products are available for years spanning 1994 through 2000, with the next update expected in December of 2001. The data work directly with ARC/INFO, ArcView, MapInfo Professional, and are available in a number of industry standard formats, including .TAB, .SHP, and .DBF. For more information visit [www.spatialinsights.com/data/geodata/bank](http://www.spatialinsights.com/data/geodata/bank).

## Site usability tool from Modalis

Modalis Research Technologies, Inc., San Francisco, has released the Modalis User Experience Diagnostic (UXD) system, which is used to analyze Web site visitor behavior, measure site usability and capture users' personal assessments of their online experiences.

Modalis UXD has two primary components: a site path tracking tool, which records users' behavior as they navigate a Web site, and a built-in interviewing technology that allows the users to describe their experiences as they happen. Users are directed to

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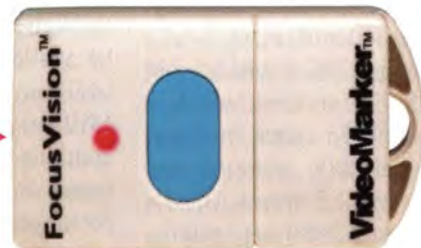
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# Research Industry News

## News notes

**Total Research Corporation**, Princeton, N.J., announced the signing of a letter of intent with **GfK**, a Nuremberg, Germany-based market research company, for the proposed sale of Total's 51 percent interest in its Romtec-GfK joint venture to GfK. Total Research acquired its interest in the Romtec-GfK joint venture in its May 2000 acquisition of Romtec plc, a U.K.-based IT and telecommunications market research company. Pursuant to the letter of intent, Total's share of Romtec-GfK would be sold to GfK for \$2.160 million, which is approximately 1.55 times the joint venture's fiscal 2000 revenues and approximately 22.5 times Total's share of its fiscal 2000 net income.

The joint venture generated revenues of approximately \$1.395 million and net income of approximately \$188,000 in fiscal 2000. The proposed sale is subject to the execution of a definitive agreement and other customary conditions.

Research firm **Millward Brown** has announced a move to distribute its interactive intelligence throughout the company. Interactive tools that were previously available primarily through its San Francisco office will be available to all clients out of all offices across North America. Millward Brown IntelliQuest will continue to maintain a team of custom interactive research specialists in its New York office. This team will serve

as both internal consultants to the rest of Millward Brown and as external consultants to marketers with complex interactive needs. Additionally, the Austin, Texas, office of Millward Brown IntelliQuest becomes the integrated production center for North American interactive operations.

Separately, responding to recent corrections in the technology market, Millward Brown has made adjustments to streamline its interactive and high-technology marketing research groups. The firm has rolled its interactive group (Millward Brown Interactive) into its Austin-based technology marketing research group, and closed its San Francisco office on June 1. In addition, Millward Brown IntelliQuest has reduced its workforce



The Marketing Research Association (MRA) will hold its 43rd annual conference on June 6-8 in New York. For more information visit [www.mra-net.org](http://www.mra-net.org).

On June 20-22, IQPC will hold a conference on online market research at the Kingsway Hall Hotel in London. For more information visit [www.iqpc.co.uk/1509a](http://www.iqpc.co.uk/1509a).

The European Society for Opinion and Marketing Research (ESOMAR) will hold a conference on radio research on June 24-26 in Athens, Greece. For more information visit [www.esomar.nl](http://www.esomar.nl).

The European Society for Opinion and Marketing Research (ESOMAR) will hold a conference on online measurement on June 26-28 in Athens, Greece. For more information visit [www.esomar.nl](http://www.esomar.nl).

The Association of European Market Research Institutes (AEMRI) will hold its international conference at the Hilton Berlin on June 28-29. Titled "New Product Research in the 21st Century," the conference will examine the contribution of research to marketing success with new products. For more information contact Richard Chilton at 44-20-7736-4445 or visit [www.aemri.org](http://www.aemri.org).

The Association for Qualitative Research will hold its

annual convention on July 5-7 at the Duxton Hotel Melbourne, Melbourne, Australia. For more information visit [www.latrobe.edu.au/www/aqr/](http://www.latrobe.edu.au/www/aqr/).

The Institute for International Research (IIR) will hold a conference on measuring and improving customer satisfaction at the Hilton San Diego Resort on July 18-20. For more information visit [www.iir-ny.com](http://www.iir-ny.com) or call 888-670-8200.

The Institute for International Research (IIR) will hold a conference on ethnographic/observational market research at the Hilton San Diego Resort on July 25-27. For more information visit [www.iir-ny.com](http://www.iir-ny.com) or call 888-670-8200.

The ninth Sawtooth Software conference on acquisition and analysis of market research data will be held September 12-14 in Victoria, B.C., Canada. In addition to the general conference, there will be optional tutorials, clinics and workshops. Attendance will be limited to 250 participants. For more information call Marilyn Stanford at 360-681-2300 or visit [www.sawtoothsoftware.com](http://www.sawtoothsoftware.com).

The European Society for Opinion and Marketing Research (ESOMAR) will hold its annual congress in Rome on September 23-26. For more information visit [www.esomar.nl](http://www.esomar.nl).



by 13 employees.

**Hormel Foods Corporation** has agreed to renew its contract with Schaumburg, Ill.-based **ACNielsen** U.S. Under the new five-year contract, Hormel Foods will continue to use the ACNielsen SCANTRACK syndicated retail measurement service for product sales information, as well as the ACNielsen Homescan consumer panel for consumer insights.

Canadian research software developer **Itracks** announced that its online qualitative division hosted 74 percent more online focus groups in March 2001 than in the same month last year.

With the passing of company founder John Elrod 13 months ago having not been widely reported, the staff at **Sigma Validation**, Fort Lee, N.J., wish it to be known that the company is moving forward and is continuing the work Elrod began in 1978 with duplicate number validation,

which uncovers potentially data-corrupting issues in consumer research studies such as interviews that involve professional respondents, false or fabricated interviews, and/or unmet screening requirements.

**ACNielsen Entertainment** will use its proprietary ReelResearch Internet-based system to provide real-time audience information for the CBS television network and other Viacom television companies at the new CBS Television City research center at the MGM Grand Hotel in Las Vegas. ACNielsen Entertainment will outfit Television City with the ReelResearch online system to survey visitors about their entertainment and lifestyle interests and habits. In addition to providing real-time audience feedback and demographics for CBS, the ReelResearch system will be used to conduct research for other Viacom entertainment properties.

Venture capital units of Ford Motor Co. and Nokia Corp. joined an \$8 mil-

lion investment in Cincinnati-based **Intelliseek**, an application service provider and developer of software for analyzing consumer word-of-mouth and other market influences. Ford's Venture Capital Group and Nokia Venture Partners provided undisclosed funding, bringing the total raised by the four-year-old company to \$14 million so it may more aggressively market its technology for automating data searches and aggregation across the Internet, intranets and extranets.

### Acquisitions

**The Arbor Strategy Group**, an Ann Arbor, Mich., consulting firm, has acquired the **New Products Showcase & Learning Center**, a collection of more than 65,000 consumer products. ASG has relocated the collection to Ann Arbor and renamed it NewProductWorks (NPW). NPW is an interactive environment for new product information, stimulus, and

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# Qualitatively Speaking

*Qualitatively Speaking is a regular column in which a revolving cast of authors offers their thoughts on various aspects of the multifaceted world of qualitative research — in 1,000 words or less! Submissions are welcome. Send your ideas or manuscripts to Quirk's Editor Joe Rydholm at [joe@quirks.com](mailto:joe@quirks.com).*

## ***Online focus groups are no substitute for the real thing***

By Tom Greenbaum

*Editor's note: Tom Greenbaum is president of Groups Plus, a Wilton, Conn., research firm. He can be reached at 203-834-1126 or at [tlg@groupsplus.com](mailto:tlg@groupsplus.com).*

**D**espite the major problems experienced by so many dot-coms in the past several months, interest in using the Internet to conduct qualitative research hasn't waned. The appeal of this approach is basically due to the low cost of the technique compared to traditional focus groups, the ability to get more than a local sample participating in the sessions, and for some, the speed with which the projects can be completed. Unfortunately, in my opinion, these potential benefits are more than offset by the pitfalls associated with this methodology, particularly when considered as an alternative to traditional focus groups.

The following will review some of the strengths that traditional focus groups offer that are simply not available with the Internet version. If users of research feel these are not important to them when conducting qualitative research, it would be most advisable to talk to some independent consultants who are capable of providing objective advice as to the importance of the various points raised in this article.

- Traditional focus groups offer the benefits of face-to-face interaction among the participants. This enables a skilled moderator to utilize the group dynamics to explore an issue, and importantly, to allow the participants in the session to discuss the topic among themselves, which

normally will result in a much more in-depth exploration of the topic.

- An experienced focus group moderator will use non-verbal reactions of the participants both to direct the nature of the discussion and also as a part of the ultimate analysis process. Often, the non-verbal response of a participant in a focus group will be as important as what they say in terms of determining their feelings toward a topic under discussion. One does not have to be a highly experienced moderator to identify non-verbal signs from participants that indicate boredom, excitement, confusion, etc. The Internet focus group does not enable the moderator to use this aspect of human communications as an input in the process.

- In traditional focus groups the moderator is an authority figure who can direct the flow of the discussion to ensure that the most productive use of time is made, based on the needs of the client organization. This authority role is also very important, as it enables the moderator to elicit comments from all participants in the group, and to minimize the influence that one or more people are trying to have over the others. While the Internet focus group technique is not nearly as encumbered by the problems of one person influencing the other, there also is not the same sense of community and sharing of information in the Internet environment as in a live group discussion. Further, the moderator becomes more of a traffic cop in

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# Conjoint analysis in pharmaceutical marketing research

By Yilian Yuan and Gang Xu

*Editor's note: Yilian Yuan is director, marketing analytics, IMS Health, a Plymouth Meeting, Pa., health care information firm. Gang Xu is associate professor and project director, Jefferson Medical College of Thomas Jefferson University, Philadelphia. Yilian Yuan can be reached at 610-834-5177 or at [yuan@us.imshealth.com](mailto:yuan@us.imshealth.com). Gang Xu can be reached at [gang.xu@mail.tju.edu](mailto:gang.xu@mail.tju.edu).*

**C**onjoint analysis is a technique that evaluates the importance of a product's attributes to consumers. For a pharmaceutical product such as a drug, its attributes may include price, dosing, efficacy, and side effects, among others. Conjoint analysis is used to examine how consumers' perceptions of these attributes influence their preference of the products. In a marketing research study for the pharmaceutical industry, "consumers" usually refers to physicians and patients. As we know, when consumers are making decisions on either prescribing a drug (e.g., physicians) or buying a drug (e.g., patients), they are comparing the drug with other drugs on the market. They are evaluating almost all the attributes of the drugs, the pros and cons, simultaneously. A drug may have a low price, but if it requires three daily dosages, it may be a less convenient option.

Similarly, a drug with a high efficacy may also have many side effects. In this regard, consumers are making trade-offs: they set the priorities in terms of importance of these attributes to the patients. Consequently, their preference to a product depends on these priorities. One uniqueness of conjoint analysis is that it assesses a consumer's preferences more accurately than other traditional methods by examining these trade-offs. For this reason, conjoint analysis studies are also sometimes referred to as a multi-attribute trade-off studies.

Conjoint analysis is perhaps the most widely used technique in quantitative marketing research. Since its first introduction in the early 1970s (Green and Rao, 1971; Green and Wind, 1975), it has been applied in many different areas ranging from cars (Johnson, 1974) to air travel (Green and Wind, 1975), job application (Norman 1980), the arts (Currium, 1981), health plans (Acito and Jain, 1980), and medicine (Graf et al, 1993). It is perhaps the most documented applied statistical techniques in quantitative marketing research (Louviere, 1988).

Practically, a conjoint study answers the following three key research questions:

1. How important are a product's attributes to con-
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# The NP 4P paradigm



*Editor's note: Michael Latta is executive director of YTMBA Research, and Dr. Murray Simon is president of D/R/S HealthCare Consultants. For more information call 717-229-0701.*

**N**ew product/drug launch research methodology has been going through a process of evolution for a long time. Twenty-five years ago it was not uncommon for pre-launch strat-

egy research to consist primarily of a series of focus groups with appropriate medical professionals in four or five cities with an emphasis on questions such as: What do you like about this drug? What do you dislike about it? If it were to become available tomorrow, what is the likelihood you would prescribe it? What patients would you prescribe it for? What patients would you not prescribe it for? What drugs cur-

rently in use might it replace? And (by the way) which of these three ads do you like best?

In years gone by, many a drug was launched with little more than a qualitative attitudinal study as described above coupled with a pricing study. But given the competitive nature of today's drug market, with so many therapeutic entities competing for the physician's (and the patient's) attention and with





A

physician-targeted

research

approach

for new

product/drug

launches

By Michael Latta and Murray Simon

the cost of new drug development so high, pharmaceutical clients are demanding a much greater degree of marketing guidance and predictability from their market research studies. As qualitative researchers, the onus is on us to be innovative and analytical. The days of qualifying every statement in a qualitative report with “suggests that” or “may be indicative of” coupled with a liberal assortment of “insightful” ver-

batims are over: most pharmaceutical clients expect qualitative research to provide analytical commitments and our relative success as researchers depends on it.

#### **The NP/4P paradigm**

We have been working on a research model for developing new product/drug launch strategies utilizing a pre-launch, four-phase program that begins and

ends with qualitative research. The NP/4P paradigm represents a combination of older, proven methodologies and new ideas structured within a specific format and time frame (usually six months), resulting in a body of information that represents an opportunity for pharmaceutical companies to develop successful positioning strategies capable of maximizing:

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# Segmentation tools help predict patient needs



By Nancy V. Paddison

*Editor's note: Nancy V. Paddison is a marketing communications specialist at Customer Potential Management Corporation, East Peoria, Ill. She can be reached at 800-332-2631.*

**G**etting to know customers' preferences, needs and likelihood to use a company's products is the starting goal for customer relationship management (CRM). On the basis of customer data analysis, companies continue or modify existing products and develop new ones. To solidify one-to-one relationships with their customers, companies are relying on data analysis for relevant customer intelligence that can lead to a competitive edge, increased loyalty and lifetime value.

In the health care market, which struggles consistently with financial strain and little product differentiation, CRM solutions can help providers to be more targeted and efficient in reaching the right patients with the right information to improve wellness, approach disease more proactively, or to lessen the physical and financial burden of chronic illness.

The success of such a solution hinges on information — obtaining it, analyzing it, acting on it and measuring it to achieve stated goals and objectives. But there has to be a top-down commitment to the power and correct use of such data. In a survey conducted by the META Group, only 29 percent of 800 business and information technology executives polled said their company was adequately using customer data, while 67 percent disagreed. In addition, while 92 percent of respondents said achieving customer intimacy is a priority, four



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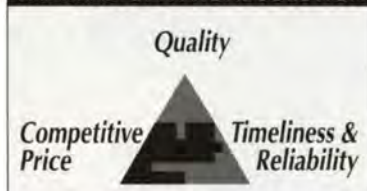


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out of five individuals said “No” when asked, “Does your company know who its customers are?”

Despite the fact that health care traditionally lags behind other industries in adopting technology, there are some encouraging signs that data analysis, segmentation and prediction are making inroads and a difference.

### Cluster codes and beyond

Traditionally health care used mass direct marketing techniques to reach people in their service areas, but as the costs continued to rise and responses fell, they looked for a better solution. The first improvement in target marketing, or the beginning of customer relationship management (CRM), was segmentation by geography. Planners looked at where customers were buying and focused on those areas, omitting unproductive regions.

Next, cluster codes enabled planners to take a large data set and divide it into smaller groups or “clus-

uct preferences.”<sup>11</sup> In the absence of any individual information, geodemographic clusters are a reasonable solution. Cluster coding thus became a standard by which many health care organizations sought to reach households and even individuals. The rationale was “we know who you are because we know where you live.”<sup>12</sup> However, information to form demographic clusters comes from data collected by the Census Bureau only once every 10 years about averages of age, income and other variables.

All of these facts are collected and summarized at the census tract level. Unfortunately, any individual uniqueness is lost during geographic aggregation and summarization. Cluster systems are based on geographic similarities and averages, rather than individual attributes and differences.

The fatal flaw of cluster systems in health care is that the variables used to design the clusters have nothing to do with health care. Health care strategists could not use such cluster

#### Differences between predictive market segmentation and cluster code market segmentation

Predictive segmentation	Cluster codes
Based on health care variables and predictive algorithm.	Based on non-health care variables such as geographic location and clustering algorithm.
Segments market based on differences.	Segments market based on similarities.
Provides individual profiles; individuals may fit into one or many groups depending on behavior or disease risk.	Provides group profiles; individuals are lumped into ONLY one group or another.
Predicts individual service use.	Predicts group service use.
Uses dynamic and continually refreshed data.	Uses static data from census gathered every 10 years and minimally updated.

ters” based on similarity. Geographical areas were thus defined by smaller groups containing similar people or demographic attributes such as age, marital and economic status.

“The idea behind all demographic cluster systems is the same. Each system divides neighborhoods into groups based on similarities in income, education and household type, as well as attributes and prod-

codes alone to develop long-range and strategic plans about specific health care services and products needed by individuals. Heart disease doesn’t discriminate by cluster group or neighborhood. Neither does breast cancer, diabetes or even birth defects.

To move beyond the generalization of clusters and information such as sex, zip code, income and geography, more predictive models that can segment individuals on the basis of



health care variables and status have been developed.

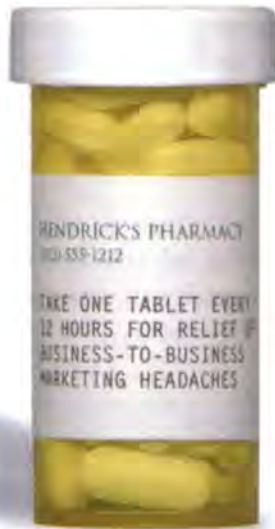
Technology has come a long way in the 20 years since clusters were conceived. Today we have sophisticated databases, data mining, neural networks and statistical capabilities that allow health care organizations to seek smaller and more precise bits of information to forecast health care needs. Data mining techniques have been used to build predictive models for health care that can identify who will most likely need certain services and who will most likely fall ill. Such capabilities actually expand CRM beyond marketing and information provision to better disease prediction, service utilization planning and cost efficiencies.

The ultimate goal is wellness and improved health by drawing a more complete picture of patient needs and then offering programs and services necessary to help change their lifestyle and health care management. Providers hope that this ongoing responsive and more pinpointed approach will help establish better patient relationships and increase patient loyalty. The chart at left shows the critical differences between predictive segmentation and cluster codes.

#### **Predicting who needs care**

One program, the Consumer Healthcare Utilization Index (CHUI), provides a health risk profile similar to the way a credit rating calculates an individual's credit risk. The profile is based on one of three levels: major diagnostic categories (MDC), such as pregnancy and childbirth and the circulatory system; the top 100 identified medical service areas of the 21st century such as weight management, diabetes and cardiovascular disease; and diagnosis related groups (DRG) such as cardiovascular medicine and urology.

The index provides a number between 0-999 that indicates an individual's propensity to use specific health care services. The higher the score, the greater the likelihood the



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individual would need that service in the category selected. The scores are gathered through an algorithm based on the results of data mining research. Using that empirical model, scores for patients and prospects are calculated from enhancement data that is overlaid onto the health care organization's database for data analysis and use with communication management tools.

This index can forecast the need for certain health care services throughout the lifecycle. What one person requires today will change over time with age, and probably differ from those of a spouse, friend, or co-worker.

A post-campaign analysis shows how predictive modeling might have changed the approach and results of one CRM effort. A Midwestern medical center, part of a larger health system, did a direct mailing of 6,887 postcards to females ages 41 to 55 with incomes greater than \$25,000 in a selected geographic region. The postcard was part of a monthly women's educational series designed to provide health information and increase use of the hospital's cardiology services.

In terms of revenue received and new patients, the campaign had good results. In the first six months, 14 new cardiology patients resulted from the mailing, with 16 services required by those 14 patients. The ratio of received to spent dollars was \$126 to \$1. But did it reach the right individuals? Could it have been more effective?

When MDC 05 Cardiology (diseases and disorders of the circulatory system category) was appended to records used for the initial mailing, a better picture of which women are most likely to require cardiology services based on their health risk emerged.

The numbers showed that:

- All women who responded to the promotion had scores of 450 or higher, which indicates a moderate risk for cardiac disease and therefore, need for services.

- The higher the predictive score,

the greater the use of services and revenue generated.

The medical center then scored all women in its entire database to see how many women with scores of 450 and higher compared with the initial list segmented by age and income. Here's what they found:

- The number of women in the overall database with MDC 05 scores of 450 and higher was 29,859, but only 5,146 females with these scores received the initial mailing. Therefore, more than 24,000 appropriate individuals — those who could benefit most from this information, as identified by the predictive model — did not receive the mailing.<sup>3</sup>

Beyond better targeting for health information and education campaigns, predictive modeling is making it into the disease management market. With more than half of health care costs attributable to approximately one-fifth of the population with a chronic medical condition such as asthma, heart disease or diabetes, effective targeting and prediction about this minority could save billions in health care costs each year. More importantly, it could motivate and help people with chronic diseases avoid health care crises.

Al Lewis, president of the Disease Management Association of America, and executive director of the Disease Management Purchasing Consortium, says the sales of disease management software and services approached \$390 million in 2000. He predicts the number will grow by about 30 percent annually for the next two to three years. While still a small percentage for health care, Lewis notes that it's a huge increase over just a few years earlier.<sup>4</sup>


For example in California, the parent company of a large insurer is partnering with a health care company to offer a disease management program to plan members who have cardiovascular disease. The goal is to stratify people based on medical risk and their ability to change.

Even small compliance rates, for example with a medication plan, can

be impressive. In Texas, the cost of hospitalization for congestive heart failure can be about \$10,000 a year, but the cost of treatment with a specific enzyme inhibitor runs between \$300 to \$400.<sup>5</sup>

In the Midwest, a Medicare managed-care organization used predictive modeling in combination with the identity of a wide range of contributing factors — such as stress emotions, function level, treatment compliance and personal beliefs — to predict near-term health care consumption of 4,632 of its risk members.

After 12 months, the predictive algorithm was able to identify with 92.5 percent accuracy members who incurred more than \$25,000 in health care costs. In combination with stratification from the identifying factors, the organization realized a 50 percent reduction in costs per member, per month, and a 38 percent savings over the cost of traditional managed care.<sup>6</sup>

Predictive segmentation, which allows organizations to focus more time and resources on the most relevant issues of its market, is a prudent departure from cluster code methods designed to reach groups solely on the basis of geography or other attributes unrelated to health. As part of a total customer relationship management solution, this enhanced customer intelligence can result in better patient health and loyalty, retention and lifetime value. 

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Cincinnati.....	Aug 6-8	Baltimore.....	Dec 10-12

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# Bringing account planning to direct-to-consumer pharmaceutical advertising

By Robert Morais

*Editor's note: Robert Morais is chief strategic officer at Carrafiello Diehl & Associates, an Irvington, N.Y., advertising firm. He can be reached at 914-674-3968 or at rmorais@carrafiellodiehl.com.*

**W**hen direct-to-consumer prescription drug advertising (DTC) first appeared in the 1980s, the advertisements were created by agencies that focused on professional health care practitioners. In those pioneering DTC days, pharmaceutical clients would typically ask their current professional (practitioner-focused) agency to create an advertisement that would encourage patients to initiate a conversation with their physicians about an ailment and/or a branded medication. The marketer's assumption was that their professional agency understood

the ailment and the medication, knew FDA regulations, and could simply transpose the practitioner-selling proposition for the consumer target. The advertising that resulted looked strange and sounded awkward. It was often marked by uninspiring visuals, lackluster headlines, and body copy that only the copywriter's mother could love — but probably couldn't understand!

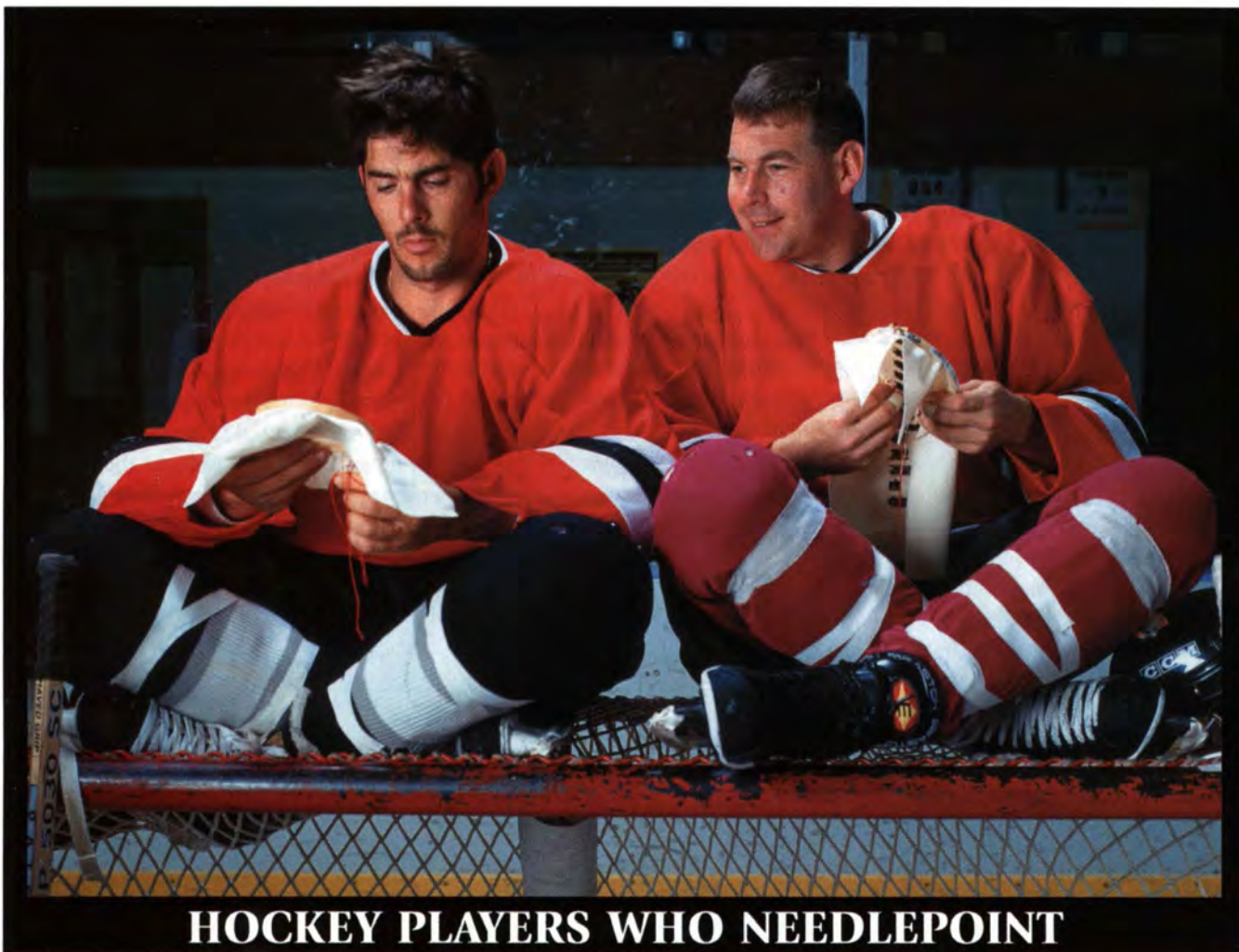
#### **A brief history of DTC assignments**

During the early 1990s DTC media spending skyrocketed. Consumer-focused advertising agencies, especially those with health care subsidiaries or over-the-counter brand advertising experience, saw the DTC gravy train and wanted to jump on. DTC assignments began to shift from professional agencies, or be initially awarded to consumer shops. Ten

years ago, the list of DTC advertising assignments was dominated by venerable professional agencies. Today, consumer agencies such as Deutsch, Leo Burnett, Grey Advertising, Young & Rubicam, and Lowe Lintas handle many DTC brands. To be sure, a few agencies such as Commonhealth's Quantum Group, the Merkle Newman Hartley Healthworks Division, and our firm have made a strong case for the integration that marks the best jointly-developed practitioner and DTC communications programs. However, these exceptions do not forgive the staggering lost DTC revenue opportunities to professional agencies.

The shift of DTC from professional to consumer advertising agency stewardship can be understood from several perspectives. The consumer agencies convinced DTC advertisers





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that the expertise needed to create brand-building DTC ads was not the medical knowledge held by professional agencies but rather the deep understanding of consumer behavior that is the province of consumer agencies. The pitch also stressed the unparalleled branding skills of consumer agencies. Professional agencies responded by learning, applying, and selling the branding concept. They hired staff with consumer advertising backgrounds to mitigate the consumer agency contention that their personnel were better equipped to connect with and motivate the consumer target. Still, DTC assignments flowed to consumer agencies.

What the professional agencies did not do was gain research-based consumer understanding for DTC campaigns. This inaction may be the major reason why so much DTC has fallen into the hands of consumer advertising agencies. Consumer agencies do not only sell themselves on the basis of their consumer understanding, they have specialized departments that focus sharply on consumer behavior and attitudes. These departments, known collectively as account planning, boast a skill set that is virtually unknown in professional agencies. In an informal survey of several managers at professional shops and among executive recruiters specializing in professional agencies, I found few individuals who even knew how to define account planning! Yet an advertising agency icon no less than Jay Chiat once referred to account planning as “the best new business tool ever invented.”

### Account planning

Account planning, conceived in England during the late 1960s, arrived in the United States in the early 1980s, initially at agencies such as Chiat Day and J. Walter Thompson. Account planning is part consumer research, part strategic planning, and part account management with a good measure of creativity. Some people (planners among them) contend that

account planning makes advertising more relevant, more credible, and more distinctive. Many argue that the job of the planner is to represent and interpret consumer wants and needs throughout the creative development process. Planners develop a more profound understanding of brand equities and target customers than anyone on the agency and marketing team. They conduct firsthand research ranging from focus groups to in-home observations to psychologically-oriented projective tests. They lead ideation sessions. They write creative briefs. Planners work close-

ment; it incorporates all of the learning and insights generated thus far. “Creative Development” gives life to the analytical work upon which it is based. An evaluative phase of strategies and creative work is often built into the account planning process at critical junctures.

Because all agencies differ and each planner brings a personal expertise to an assignment, the planning process is varied in content and scope. Whatever the model, with the right analysis and insights, planners unlock potential in brands that might never be tapped without their guid-



ly with creative teams to tell the story of why a consumer should choose one brand over competition.

The accompanying chart illustrates one model for the account planning process. In this model, planning begins with an analysis of the marketplace, the competition, a brand’s strengths and weaknesses, pertinent demographics, psychographics and cultural trends. “Analytical Ideation” refers to a method that borrows from linguistics, psychology, anthropology, traditional ideation, and classic marketing to provide a springboard for new strategies and research questions. Customer research may include qualitative and/or quantitative inquires. The “Creative Work Plan” is the blueprint for creative develop-

ance. It is often argued that account planning, part of many disciplines and a discipline of its own, simply makes advertising better.

### Account planning and professional advertising agencies

Account planning, either as an operating philosophy or as a free-standing department, is common to virtually every major consumer advertising agency. Given its strengths, it is surprising that professional agencies have not adopted it. Yet there may be a simple explanation for why planning is not generally found in professional agency suites. Professional ad agencies often hire account managers with experience in pharmaceutical sales, a reasonable



decision given the target of most of their communications efforts. These managers often believe that their firsthand experience as sales representatives provides them with a thorough understanding of their professional target. After watching a focus group or two, they feel they have all the information they need to guide creative work. Whether or not this assumption is valid, there is no question that this approach is less effective when defining creative direction for campaigns targeting patients/consumers. Such targets lead complex lives. They have heartfelt attitudes about their illness, or wellness, in the case of vanity drugs such as Propecia for baldness. They have unique relationships with their health care providers. This is where account planners, who specialize in accessing consumer thoughts and emotions, bring critical value.

For account planning to work, it must be championed by top agency management and embraced by account managers and creative personnel. Cooperation and mutual respect between agency research managers and account planners is essential. Account planners must become leaders of the strategic planning process and partners in the creative development process. They must also take a leading role in new business because planners help mine insights that can win a pitch. At the same time, account planners should not be viewed as the saviors of an agency's poor creative or disappointing new business performance. Unreasonable expectations of account planners will bring frustration and make it difficult for planners to do what they do best.

Adoption of account planning by professional agencies will provide them a new tool to compete with consumer shops for DTC. Moreover, the application of account planning to practitioner-focused communications will add enormous value. By linking their inherent knowledge of professional behavior and medical science with a more rigorous process for

obtaining customer insights, professional agencies will gain an edge in their quest for new practitioner as well as DTC assignments. **19**

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If there is one thing the most recent census tells us, it is that the ethnic complexion of the United States is changing in an unprecedented, dramatic fashion. In fact, if the growth of ethnic populations continues to soar according to projections, then the term "minority" — commonly used to denote people of color in this country — will increasingly become a misnomer. Like other industries seeking to respond to the sweeping demographic changes occurring among American consumers, it is imperative that pharmaceutical companies and health organizations understand the increasingly multi-ethnic dimension of health care, as ethnic populations are poised to

become a new majority over the next several decades.

### **The changing complexion of America**

According to Census 2000, ethnic populations currently comprise 32 percent of the overall U.S. population, or approximately 88 million people. Hispanics now represent the largest segment of this multi-hued American population, recently overtaking African-Americans to become the largest ethnic minority group in the country. Overall, the composition of the three largest ethnic populations is: Hispanics at 12.5 percent, African-Americans at 12 percent, and Asian-Americans at 4 percent of the U.S. population.

All three of these ethnic communities have exhibited astounding growth in the past decade, due to rising immigration and natural birth rates. Asian-

Americans grew at the fastest clip — 42 percent between 1990 and 2000, while Hispanics grew at an equally impressive 39 percent rate during the same period. The African-American population grew at a more modest pace at 14 percent but was still at a considerably higher level compared to the white population, which only grew 7.3 percent. These contrasting growth patterns reveal broad divergence in growth between minority and non-minority populations.

Moreover, these numbers only represent the official figures; although the Census Bureau has markedly improved its survey responses, it is widely understood that ethnic populations are significantly undercounted in the decennial census. As a result, a substantial group of ethnic minority populations are under-represented in the official results.

Thus, not only are the actual numbers



**Quantitative:** he prescribes 20% more of your product

**Qualitative:** and because he's buddies with the drug rep,

Aaron, who he went to college with and who

always takes him out to lunch at that great

steakhouse downtown, and because he knows

Aaron and trusts Aaron and Aaron has told

him, and he has seen for himself among his own

patients, that the product has fewer side

effects than the competitor's and that the

once-a-day dosage makes his patients more

compliant than usual which of course leads to

higher efficacy which makes him think of the

advertising campaign for this particular drug

which at first he didn't really like but is now

kind of growing on him, what with the

beautiful photography and the compelling

copy and those really interesting direct mail

packages they send to him, plus the pills are

pink, which is his favorite color, although he

would never admit that to any living soul,

being that he tries to act macho so people will

respect him not just for being a doctor, but for

being a cool guy as well, which he's over-

sensitive about because he's always thought

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of ethnic groups larger than the official count, ethnic populations are projected to continue their rapid ascent into the immediate future. Hispanics and Asian-Americans are anticipated to grow approximately 260 percent by 2050 while African-Americans are expected to grow over 80 percent in the same period. As it has in the past 30 years, the bulk of this growth will occur mostly in America's sunbelt regions and major metropolitan areas. According to most prognostications, ethnic communities will constitute a majority of the U.S. population in the next 25 to 30 years, as they already do in such states such as California.

### Today's ethnic markets, tomorrow's mainstream customers

Not only are ethnic populations making significant strides in population growth, they are also positioned to redefine mainstream consumer trends due to their considerable and escalating purchasing power. According to the Selig Center for Economic Growth at the University of Georgia, buying power soared for all ethnic groups between 1990 and 2001. Their findings among the three largest ethnic groups reveal that:

- African-American buying power grew from \$308 billion to \$572 billion.
- Hispanic buying power grew from \$208 billion to \$542 billion.
- Asian-Pacific-American buying power grew from \$113 billion to \$254 billion.

Among these three groups, spending power rose astronomically, doubling in the last decade from \$628.2 billion to \$1.3 trillion. This purchasing potential is projected to top \$4 trillion in another 15 years, as record numbers of Hispanics, African-Americans, and Asian-Americans will transition from secondary schools and colleges into the labor force. These gains demonstrate that ethnic populations are only now beginning to make their presence felt in the marketplace. As these consumer segments really begin to demonstrate their spending potential in the not-too-distant future, they will cast an indelible mark on the economic mainstream.

This will have far-reaching ramifications for pharmaceutical companies

who count on a growing base of consumers to drive their sales. Of the currently estimated \$100 billion per annum pharmaceuticals market, \$25 billion is driven by ethnic consumers — with very little in the way of ethnic marketing and advertising strategies directed towards them. Hence, as these ethnic customer segments grow, the untapped opportunity represented by culturally-relevant ethnic marketing rise with every passing year.

### The ethnic health care divide

Despite the impressive population and economic strides made among ethnic communities in the U.S., significant health challenges exist that may define the health care marketplace for decades to come. Although U.S. health care is widely considered the most advanced in the world, there are significant health disparities within U.S. ethnic populations. These health gaps have only recently begun to receive broad national attention in the past several years — exemplified by the launch of a five-year presidential initiative in 1999 via the U.S. Surgeon General's office with a mandate to eliminate health inequities among racial and ethnic groups.

Health challenges for ethnic populations exist in the following areas:

#### 1. Access to health insurance

Although, some improvements have been observed in recent years, health care access continues to be a central challenge among most ethnic minority populations. In this country, 34 percent of the foreign-born population is without health insurance compared to 14.4 percent of the native-born population.

More than a third of the U.S. Hispanic population does not have health insurance. They compose the largest segment of the uninsured at 36 percent — compared to 23 percent for African-Americans, 22 percent for Asian-Americans, and only 14 percent for whites. Additionally, they are the smallest segment to be covered by private insurance (either privately purchased or employer-based) at 45 percent. A larger proportion of African-Americans and Asian-Americans are covered by private insurance — 54 per-

cent and 69 percent respectively — but is still significantly below the 79 percent private insurance coverage of whites. The great majority of the uninsured among Hispanics are from working families.

Even more alarming is that the lack of health care access for Hispanics has been steadily increasing. For instance, between 1977 and 1996, Hispanics who stated they have "no usual source of medical care" grew from 20 percent to 30 percent of the overall population — while they remained constant for whites

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and African-Americans. Likewise, Latino children are three times more likely to be uninsured at 29 percent — compared to 12 percent of Asian-American, 10 percent of white, and 10 percent of African-American children.

### 2. Increased risk factors

In addition to a lack of health care access, ethnic populations also face certain risk factors at greater levels than the general population. Although the leading causes of illness and of death among ethnic groups do not differ significantly from each other, their incidence rates among Hispanics, African-Americans, and Asian-Americans are considerably higher (i.e., heart disease, certain varieties of cancer, etc.). Because of these disparities and the unique incidence levels for some ethnic populations, different forms of therapeutic treatment are necessary.

Among the most distressing risk factors for ethnic populations include:

- Heart disease — Heart disease is the leading cause of death among all groups, and is particularly high in the Hispanic population. Over one-quarter of all deaths among Latinos are attributed to heart disease, while among Hispanic females, the rates climb to 34 percent. Among Hispanic sub-groups, Cuban-Americans face the highest rates of heart disease.

In general, ethnic minorities experience higher rates of hypertension and tend to develop it at an earlier age. Despite these alarmingly high incidences, ethnic populations are less likely to undergo treatment to control high blood pressure than the general population, according to the National Heart, Lung and Blood Institute.

- Diabetes — Ethnic populations — particularly African-Americans and Hispanics — are far more likely than the white population to develop diabetes. Diabetes strikes the Hispanic community at twice the rate of the white population. On a national level, approximately one-quarter of all Hispanics of Mexican and Puerto Rican descent have diabetes, according to the Center for Disease Control.

- HIV/AIDS — HIV/AIDS cases are higher among ethnic populations in the U.S. than the white population in gen-

eral and are rising to alarming levels among the Hispanic and African-American populations in particular. Nationally, ethnic groups comprise approximately 54 percent of all AIDS cases. In California, of all new HIV cases diagnosed between 1985 and 1995, Latinos jumped from 11 percent to 24 percent of total cases.

- Cancer — Cancer is the second leading cause of death of all groups, although ethnic populations make up a disproportionate number of its mortality and incidence rates. Among

Hispanics, rates of occurrence for lung, breast, and prostate cancer are low but rates for cervical cancer are high.

### 3. Cultural factors

In obvious ways, cultural factors among different ethnic populations play a tremendous role in shaping perceptions and attitudes about lifestyle choices, healthy practices, and overall wellness — all of which determine healthy outcomes. Assumptions about diet, stress management, lifestyle, religious beliefs, relationships, and trust are all



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derived from our cultural upbringing and play substantial roles in determining the type of health practices people will adopt.

Since these factors vary widely, a concerted effort to understand the assumptions behind the attitudes and behaviors of ethnic groups in governing personal health is critical to achieving greater levels of medical awareness, ensuring the seeking of proper therapeutic treatment, and encouraging patient compliance. If the direct-to-consumer efforts of many pharmaceutical companies are to achieve any cultural efficacy, it is essential for them to consider and incorporate these assumptions into their strategies.

For instance, some examples highlighting the ethnic differences among African-Americans, Hispanics and Asian-Americans — as it pertains to health care — include the following:

- Among Hispanics, Spanish-speaking patients are less likely than English-speaking patients to receive sufficient preventive information or referrals from their providers. In part, this is attributed to language barriers that can

result in misdiagnoses of illnesses or a physician obtaining inadequate consent.

- Spanish-speaking Hispanic patients tend to be more open and ask more questions when seen by bilingual providers. The development of relationships and establishing trust is vital for Hispanics. A trust based on credentials and professional authority is not assumed.

- More than any other ethnic group, Hispanics are less adherent in visiting physicians or health experts. The percentage of Hispanics that visit their doctors for annual physicals, prenatal check-ups, and mammograms is below that of the general market. There is a sensibility that visiting the doctor is simply not necessary when you feel well. Hence, a large majority of Hispanic patients often pay for medical care out of their pockets or visit free clinics and government-funded medical facilities — often when an ailment or illness has progressed beyond the initial stage.

- A 1999 Morehouse study revealed that African-Americans were less like-

ly than Hispanics to believe there is a cause-and-effect relationship between diet and health and were also less likely to believe generic drugs were as good as name-brand drugs.

- There is a general lack of trust of the health care system among many African-Americans, Hispanics, and some Asian-American groups. Many participants do not trust health care professionals to adequately diagnose their problems. They believe they have to do their own research to validate their doctors' treatment recommendations.

- Although differences vary widely among Asian and Pacific Islander (API) populations depending on nationality (a lack of sufficient research information is available as well), API males also face numerous health care challenges stemming from lower access to health care. Some common ailments include high rates of cancer, diabetes, heart disease, tobacco use, hepatitis B, and tuberculosis.

#### Searching for the right physician

Because of the demographic sea change in the U.S., it will be important to establish cultural competency across all levels of the health care system — particularly among physicians and pharmaceutical companies.

According to the National Hispanic Medical Association, there are approximately 26,000 licensed physicians and 1,800 full-time Hispanic medical faculty across the country — not nearly enough to treat the more than 35.3 million members of the Hispanic market located in the United States. Finding a Hispanic doctor for each Hispanic patient is not a solution to difficulties brought on by cultural differences.

For instance, in California, the nation's most ethnically populous state, only 3 percent of all physicians were Latino, though greater than one-third of the population in California is Latino. The remaining composition of physicians were 75 percent white, 19 percent Asian, and 3 percent Black. This means more and more non-Hispanic members of the medical industry will be treating even more Hispanic patients.

The importance of identifying and cultivating minority physicians cannot be underscored enough. Sixty one per-

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cent of Hispanics feel it's important to be treated by someone of the same ethnicity, while 28 percent of African-Americans feel it's important.

### **The role of the pharmaceutical industry: culturally competent marketing**

Like physicians, the U.S. pharmaceutical industry can also play a critical role in understanding the racial and ethnic challenges in health care and cultivating these markets. As ethnic populations continue to grow, it becomes essential for drug manufacturers and distributors to target ethnic communities with effective communications to make them more aware of their treatment options, preventive practices, and available educational resources.

Identifying the avenues for reaching these potential patients can directly occur through exploring direct-to-consumer advertising or over-the-counter approaches. As direct-to-consumer approaches increase, communications must be informed through culturally compelling and relevant messages that


will both educate and resonate with ethnic consumers. As providers of products that enhance health, cure diseases, and heal ailments, it is in the best interests of pharmaceutical companies to recognize and address ethnic differences and disparities in the health care system. In short, health issues addressed to the multicultural market must be done through culturally competent marketing.

### **The need for further research**

The need for culturally relevant information about the exploding U.S. multicultural population demands continued research to understand existing health gaps. Additionally, research further illuminates the cultural assumptions, health care needs and practices that distinguish U.S. ethnic populations from each other — providing the key to achieving healthier lifestyles, better health-related decisions, and increased compliance. Research must identify the specific challenges facing America's multicultural consumers and demonstrate the population's growing significance

to the health care marketplace. Understanding these differences has strong implications for health care marketing, administration, and public policy agendas.

The current base of knowledge serves as a solid foundation, but the need for further research will escalate as the U.S. ethnic minority population grows. These research and information needs will increase in importance as health care providers, pharmaceutical manufacturers, and other public health groups begin to deal with the challenges resulting from this growth. It will be increasingly essential for research to explore culturally competent methods of promoting disease awareness, communication mechanisms between ethnic patients and their health care providers, treatment compliance, and a sense of well-being that is culturally derived.

These research areas will determine the important differences among America's major ethnic groups in order to improve health outcomes for the new American majority in the 21st century. 



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# Will Internet marketing



# research be boon or bane?

By Jerry W. Thomas

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**A**s we continue our free fall into a new millennium, the mind races to envision exactly what the future will bring for the human race, for the global economy, and for the marketing research industry.

Predicting the future is daunting, but a new millennium makes even the most timid of us bold and prophetic.

The glow from the crystal ball on my desk reveals many events over the next few centuries, but let's skip over these things. Never mind about the worldwide pandemics of antibiotic-resistant diseases, or the rising ocean levels just before the onset of a new Ice Age, or the re-election of Bill Gates to his fifth term as presi-

dent of the United States, or the asteroid impact in the Pacific that wipes out California, or the arrival of the first starship from our new space masters. No, let's focus on the technology that will shape the future and change the world in the next decade or two.

Despite its challenges, the Internet continues to loom gargantuan in the vaporous images emanating from the glass globe on my desk. How could



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this be possible? No one told us the Internet was coming. No one told us it was important when it arrived. Few foretold its potential, even as recently as five years ago. But here it is, pervasive, all-encompassing, a giant lattice encircling the globe, entangling the human race in its sticky webbing. How will the Internet play out? What will be the lasting effects? When will the Pied Piper of reality make an appearance and play his haunting melody? Wait! The crystal ball is flickering again and sending messages. Please let me attempt to translate.

The Internet will struggle as an advertising venue. The worldwide clutter of Web sites and Web pages will dilute most of the communication value of the Internet. Of what value is a search for "pet food" if the search engine identifies 38,000 pages in response? The Internet will not replace traditional advertising media for most product categories. In fact, the Internet might actually tend to increase demand for traditional media advertising to bring prospects to Web sites. The greatest value of the Internet as an advertising vehicle will be as the place consumers go for detailed information — once interest has been triggered by traditional media.

The Internet will be a boon to business transactions and interactions with consumers and other businesses. Orders, confirmations, status reports, account inquiries, inventory depletions, shipment data, purchase orders, product specifications, flight times, schedules, credit applications, etc., can all be accessed, processed and disseminated via the Internet — cheaper, faster and more efficiently than by telephone, mail or personal visit. The collective and accumulative effects of these transactional effi-

ciencies will be a tremendous boost in productivity that will spur economic growth in developed economies around the globe and simultaneously help dampen inflation.

Finally, the Internet will not grow up to the sky. It will reach a natural limit, a point of stasis. As is already evident, many if not most Internet-dependent businesses will fail. With such a low cost of entry, anyone with a few dollars to invest in a spiffy Web site can be up and running in no time. But as many will continue to learn the hard way, only the very strongest can survive in the Internet marketplace. One distinct possibility is that few people on the Web will ever make very much money.

### What about research?

But enough global prophecy. Let's get down to what's really important: the industry that puts bread on our tables — marketing research.

How will the Internet influence the marketing research industry? The most obvious and immediate impact will be the use of the Internet as a new data collection medium. The Internet will increasingly become a worldwide data collection vehicle for many types of marketing research, including business-to-business as well as consumer research. It is already a cost-efficient medium for conducting research, at least in the United States, Canada, Western Europe, and many parts of Asia.

Longer term, the Internet will become a worldwide data collection vehicle. Upper-income, better-educated households around the globe (these households account for the bulk of worldwide discretionary income and purchasing power) are already Internet users, and the penetration of the Internet into middle- and lower-income households is increasing rapidly. A majority of significant businesses already subscribe to and use the Internet. This is true around the world. Already in the United States, more than 50 percent of adults have access to the Internet at home or work. It's estimated that upwards of 40 million households in the United States subscribe to some

type of Internet service at home. These penetration levels are increasing rapidly in the U.S., as they are in other developed countries as well.

Many manufacturers and other companies are attempting to conduct, or plan to conduct, some type of survey research over the Internet. However, many of these newcomers to Internet surveys are also newcomers to marketing research, or at least to the "nuts and bolts" side of marketing research.

While these companies might never attempt to conduct a telephone survey themselves, many are confident they can easily and cheaply conduct research over the Internet. It looks fast, cheap and simple. Software to conduct simple surveys is widely available. But just because something looks easy doesn't mean it is. Most of these newcomers and neophytes do not have the technical expertise to reliably conduct such surveys, nor the systems and procedures to ensure consistent quality. This naiveté will likely result in some major Internet research failures that could cast a dark shadow over marketing research in general, and over Internet research specifically.

Likewise, many new "research" companies have sprung up to take advantage of the research possibilities afforded by the Internet (it seems as though everyone with a Web site is conducting surveys). Many of these new "research" firms, however, do not have formally-trained, experienced marketing research professionals on staff, nor do they have the systems in place to ensure proper sampling and data collection. "Volunteer" sampling (i.e., allowing respondents to self-select themselves to participate in Internet surveys) is a common practice. Volunteer sampling creates the possibility that some type of selection bias might creep into a survey.

Other potential sources of error in Internet surveys include:

- lack of rigorous sampling systems and methods;
- random selection of participants;
- lack of "callback" procedures;
- inadequate understanding of

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response biases (e.g., some demographic groups are more likely to respond to Internet surveys than other groups);

- questionnaire programming errors and/or software limitations;
- lack of bandwidth (so that many potential responders cannot complete the survey);
- incompatibility between the questionnaire programming software and different types and versions of browsers;
- duplicate questionnaires in the final data file (because some respondents pushed the "submit" button too many times);
- extreme data weighting to correct for sampling sins — a threat to data stability.

Other threats to Internet survey representativeness and reliability are numerous, but the above list serves to illustrate the perilous nature of Internet surveys.

The implication for the research industry is that sloppily conducted Internet research might impugn the credibility of properly conducted Internet research, and indeed impugn the credibility of all marketing research. It is important that the research industry make sure that clients understand the risks, trade-offs and mechanics of Internet research so clients can make intelligent decisions about the use of Internet surveys. The research industry must explain the difference between quota sampling and probability sampling (most Internet surveys use quota sampling, by the way). Moreover, the research industry must insist that Internet surveys be executed the same way as traditional survey research, following the same "tried and true" scientific principles.

Well, it's late now and my crystal ball is dimming. The images are fading away. Suffice it to say, the Internet will not live up to its hype. But the Internet is here to stay, and it promises to change the world. It represents a paradigm shift as dramatic as the coming of the railroad two centuries ago. Everyone aboard, and hold on to your seats. 

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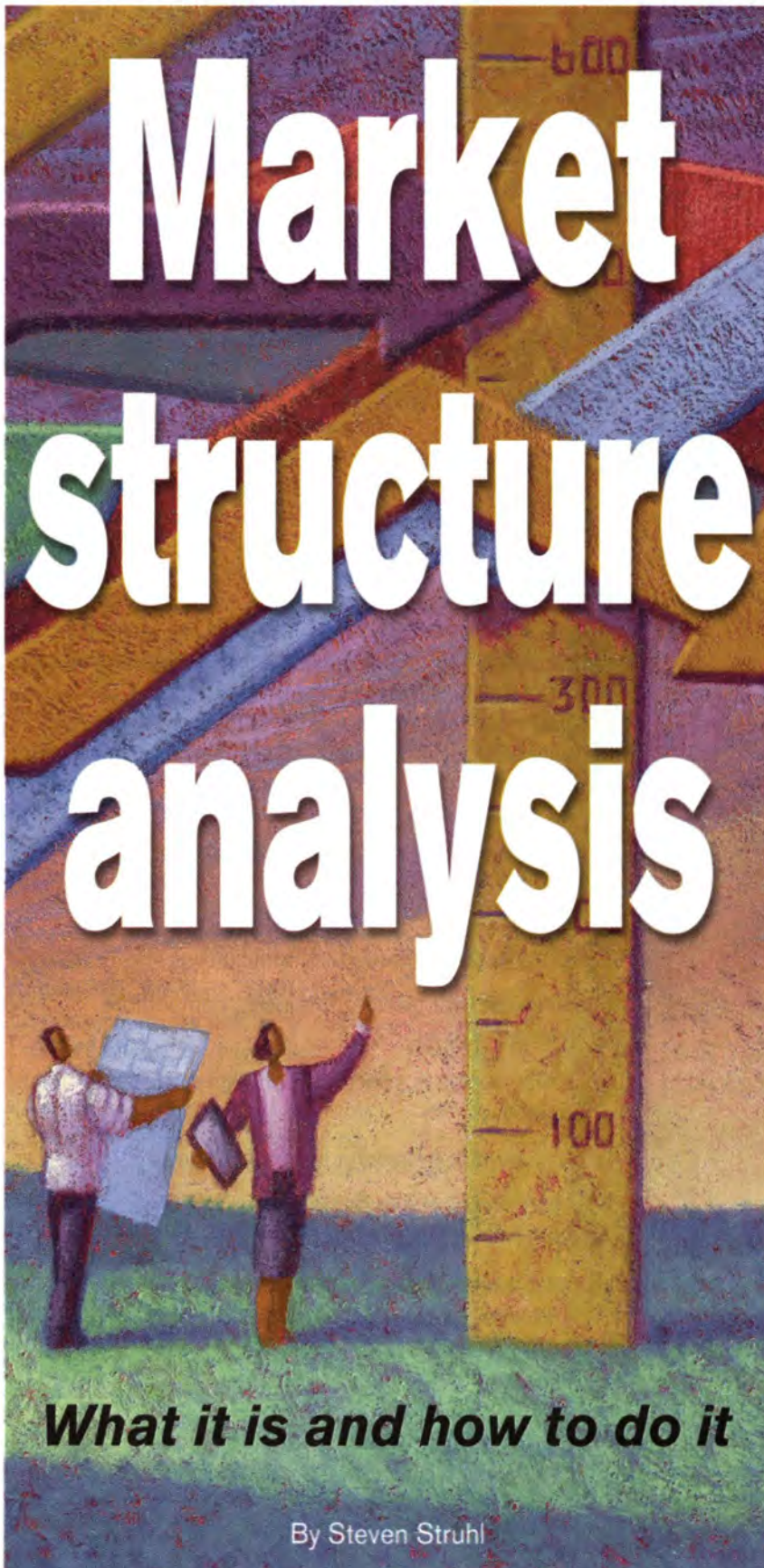
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**W**hat is market structure analysis? We start with perhaps the most obvious opening question of any article that you will read this year or next. We also begin our answer with an enthusiastic statement: "Unfortunately, no clear definition exists." Now, let's see what we can do about this.

Many of us have remained blissfully ignorant of this, but there is nonetheless a large literature on market structure analysis. (A sampling of just some of the articles is cited at the end.) Careful review of these leads to two basic conclusions:

- Numerous approaches to market structure analysis have been proposed in a very large number of scholarly works, with no approach seeming predominant.
- Plowing through all these articles requires frequent naps.

Some of the confusion surrounding this topic arises from the fact that two contrasting traditions have embraced it — namely, marketing and economics. As you might expect, the basic approaches are different. (Perhaps more surprisingly, some of the marketing papers are even harder to read than the ones from some economists. So we can see that, over the years, marketing at least has gained in the area of obscurity.)

#### **Comparing and contrasting: marketing vs. economic methods**

We will briefly review both methods, point out some very large differences and commonalities, and then discuss the marketing approach.

Marketing approaches mostly include these basic elements:

- some means to analyze the struc-





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ture of relationships among competing companies;

- some other means to analyze the structure of relationships among competing brands.

Typically these studies include several areas of focus, whether primarily geared toward looking at competitive entities or brands. They often will investigate how brands are used, and the relationships of usage patterns among brands. They often look at the relationships in ways that brands are perceived. It is fairly common for studies of market structures to include just these topics.

Price elasticities and cross-price elasticities are other important market structures, however, even though they are not often mentioned in this way. There are other, more specialized views of what belongs in a market structure analysis. Trying to summarize them can get complicated. We will pass on tackling many of the more specialized definitions, then, and hope that you can tolerate the disappointment this causes.

Market segments usually are not considered market structures. This is one of the less intuitively appealing aspects of most definitions. Segments and structures can have some fairly complicated relationships, and we indeed will discuss this later.

Now let's take a very brief view of economic approaches. The list of topics that these cover is broad and, as mentioned, somewhat different from those covered by the marketing approaches. Aspects of markets that seem to have received the most attention from the economists include:

- numbers of buyers and sellers;
- extent to which products are substitutable;
- analysis of comparative costs;
- ease of entry and exit for competitors;
- extent of mutual interdependence or (as they seem to mean) the extent to which buyers and sellers must depend on each other.

The concepts here may appear somewhat rudimentary, and lacking in appreciation of consumer psychology. One important point that the economists have in common with marketers is that they include demand elasticities and cross-demand elasticities (or words meaning the same thing) in market structures. How economists get to their answers may be very different from marketing practices, though.

Indeed, economists can do much of their work without ever talking to an actual person. Some even act as if asking people what they do or think is superfluous to understanding what

is happening in a marketplace. This may seem slightly ridiculous, but we should remember that these fellows win Nobel prizes while humble marketers and market researchers do not. Perhaps they are onto something.

The secret of their success may lie in the mathematics they use. This can range from the highly sophisticated to the truly hair-raising. Indeed, as long as people are ancillary to the equations, the concepts can get highly elaborate. You are invited to draw your own conclusions about that.

### Back to the marketing approach: a path for getting to market structures

Let's start with something that may seem self-evident, but which we still need to think about carefully. The basic consideration for all marketing analyses is reaching a definition of exactly what constitutes the market. (We did warn you that this sounds foolish. Still, just reaching a definition can be quite difficult.)

The hardest part of setting this definition is that you need to set some limits on the "competitive set" of products.

Looking at just one example, let's consider the market for diabetes care products. Most authorities say that there are two basic types of diabetics: Type I (sometimes called "juvenile,") and Type II (sometimes called "adult onset.") Type I diabetics always need insulin injections to live — their bodies typically produce none that they can use. Type II diabetics usually produce some insulin, and so often only require medications that help them use their insulin more effectively. (Also, exercise and healthier eating habits help too, as does keeping one's weight down to a reasonable level.) However, some Type II diabetics require insulin, and now many Type I diabetics are taking medications that help them use insulin better along with their insulin. This has led some authorities to say that what we really need to look at is whether a diabetic is taking insulin or not — never mind the traditional medical division of diabetes into two types.

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Kathy Johnston  
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Also, there are some new medications coming out that are aimed at treating “pre-diabetic” conditions — or to prevent the disease from taking hold.

Looking at all this, how do you define the structure of the marketplace? Which products are competing with each other, and how? Do you include the new pre-diabetic products in your analysis? How do you divide the universe of diabetic people? Where does exercise and diet figure in all this? Do they compete with products in the marketplace? If so, how?

Some method for setting limits on the market must be chosen, then. Traditionally, this was done by focusing at one these factors:

- the degree to which products can substitute for each other, based on consumer perceptions;
- the extent to which products are intended to serve similar purposes;
- the actual impact of products on each other, as measured by elasticity of demand and effects of products on each other, or cross-elasticity.

Note that the impact products have on each other and degree to which they can be substituted are highly similar ideas. The key point underlying this distinction, it seems, is that impact can be measured without considering perceptions at all. Therefore, different types of studies could be the focus of each of these options.

For instance, elasticity of demand, and related ideas, bring to mind choice-based modeling, or perhaps conjoint. (Whichever one, the same constraints hold, so we will discuss choice-based studies here.) In choice-based studies, we typically look at what people select in some set of competitive marketplaces. The focus here is on what people do, and not on their explanations of why they do it. If perceptions are addressed at all in a choice-based study, they are not part of the choosing that study participants do. What we learn comes from measuring study participants’ choices among the differing product configurations that they see in the interview and applying this to many alternative

product configurations not tested.

Similarly, studies that focus on perceptions and opinions rarely have a choice-based exercise in them. Some of the reasons for separating these types of studies are very practical. For instance, most study participants are nearly worn out after they finish a typical choice-based exercise. Since most of us want to know everything about everything when we do a study (of course), the lucky respondent may get to make choices in up to 21 market scenarios in a choice study. (The general rule here is that the more factors we want to analyze in a choice study, the more marketplaces we need to show to get the required information.) In any event, choice-based studies usually run to the known limits of a human being’s ability to do a good job in the interview.

Most of us are likely are more familiar with studies of attitudes and opinions. Therefore, we know that by the time everybody involved has added his or her pet question(s), these get to be real monsters also. Asking a person to do one of these and — at the same time — one of those (a choice-based model or full-blown conjoint task) is just too much. We need to decide which we want — or if we want both, whether we can afford to

interview two sets of people.

### One key unresolved issue in defining markets

One key issue remains largely unresolved if we start our definitions of markets by looking at substitutability or market impact. That is, neither does particularly well in studying some types of competitive behavior. The same holds if we look just at consumers’ perceptions. Of course, a set of remedies has been proposed for a largely self-imposed problem. These sometimes go under the heading of hybrid forms of structure analysis.

Hybrid methods combine behavior-based and judgment-based methods of defining markets, as well as other approaches in later stages of the analysis. (As you may have expected, we will discuss this.) In more practical terms, you might need to do all sorts of studies, such as perceptions and usage studies, and choice models, and somehow put all the information together. You might even include other topics, depending on what you need to know. Different ways of putting these approaches together almost certainly will yield different ideas about market structures. Hybrid approaches underscore the notion that the search for a

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"true" market structure is one of those great and endless quests. No one answer about what is "true" exists here, just as is the case in the rest of life.

#### Getting to an overall market structure

In marketing approaches, we almost always start with people — or as we like to call them, consumers. To reach an overall market structure, individual consumer market structures need to be aggregated. Individual structures are simply each consumer's behaviors and/or perceptions about key marketing variable(s). If you have kept your eyes open most of the time so far, you will not be surprised to learn that two main aggregation methods are used:

- behavioral aggregation (linked to studying market impact);
- subjective aggregation (linked to the extent to which products can substitute for each other, ratings, opinions, and perceptions).

Aggregation is problematic. One main question that gets asked — in some quarters, at least — has to do with what happens when we "roll up" a lot of idiosyncratic opinions. That is, how do we meaningfully aggregate individual consumer choices or opinions when these often reflect great diversity?

An aggregate market structure that we choose may NOT represent any individual's structures well. In fact, any overall market structure gives only an average view of consumer diversity. We have numerous pundits to remind us that these averages can hide information, and may even be misleading.

In fact, this is one of the charges leveled against choice-based modeling as it has been traditionally done, at the aggregate (or group) level. Unless you really torture the data from a choice-based model, you never learn anything about what individuals are doing. (The torture method of choice today is something called Hierarchical Bayesian analysis, and generally requires squeezing the numbers for days — or "just

hours" for a simpler problem, as some put it — even with the latest monster Pentium IV. But Hierarchical Bayesian analysis is another story.) The point of this is that some experts will go to great lengths to alleviate their discomfort in looking at aggregate (or group) level data.

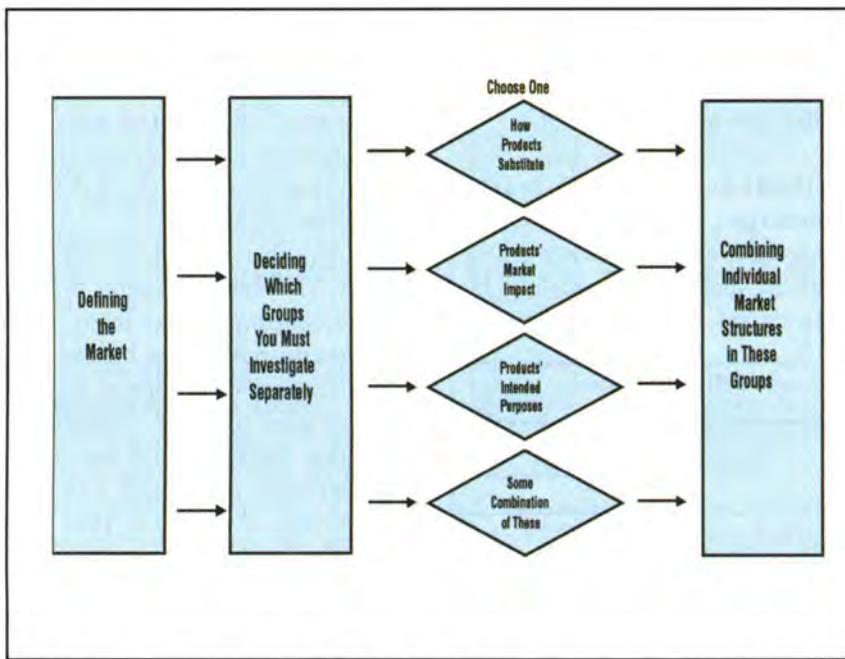
However, these complaints about looking at groups may not be that well-founded. These are some reasons. (Just remember that you read this here first.) We almost never look at a market solely in its entirety — that is, without having some groups in mind. For instance, if our goal is to study the market for (say) diet colas, we almost certainly will not interview everybody who walks into a supermarket. This might be fun, and if not, certainly very expensive, but nobody outside the further reaches of academia is likely to find this useful.

#### The secret about whole marketplaces vs. study of important groups

Rather, a useful study would focus on groups of users, such as heavy vs. moderate vs. light users — or on brand-loyal users vs. frequent switchers. Then we would observe any market structures within each group. If we have defined the groups properly, the question of diversity becomes less important. That is, heavy users are typically defined along these lines: "the 20 percent of users who consume 80 percent of our wonderful product." If heavy users are diverse, it may be nice to know this, but knowing may not help encourage them to use more of our great stuff, or even how to keep them from using less. In this case, the diversity of the group just is part of the way the world runs.

Some of you may then say something like this: "But what if some heavy users are more likely to become moderate users than others?" Or, as it more usually gets asked, "What if some heavy users are more vulnerable than others?" (This shifting of vulnerability from the product, which will suffer no recogniz-





able losses if people decide they don't need it, to the people themselves, is one of those wonders of modern marketing.)

One appropriate answer to a question like this is to structure the study so that it can isolate those more and less vulnerable among heavy users.

That is, the study would find market structures among two or more types of heavy users, and not assume that they are all the same. Here we encounter some of the real complexity that can be found in market structure analysis. To do this accurately, we need to have some good ideas

about the groups we are likely to find in the market. If groups are truly different, they will have different market structures. Just lumping these together will lead to gross inaccuracies.

In just a short note, practical marketing approaches move furthest away from (and perhaps beyond) economic approaches, by including the idea that you need to think about groups in the marketplace and to prepare to analyze them separately. In one way, then, the practitioners in marketing and market research routinely take a more sophisticated approach to market structures than their learned brethren.

At left is a flow chart summarizing this step in the process.

### Developing a working picture of the market structure

Once individual consumer behavior is aggregated, the next step is devising some working representation of the overall (aggregate) structures. The goal here is showing how

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products compete, in ways that convey the research and managerial implications effectively. Following the discussion from earlier sections, market structures may never get aggregated up to the whole market level. The analysis may look (for instance) at heavy users, moderate users and light users separately, and go into some depth about each. It may compare and contrast groups that are important to understand. Finally, it may include some communalities, especially areas

where strengths and weaknesses appear across the groups studied. It almost never would try to extract some global view and leave it at that.

### Methods for depicting market structures

We can divide approaches for representing market structures into two main classes, namely, the spatial and

showing how products relate to ratings. This type of map often is called a perceptual map — as are many other types of maps. Not all maps that show attributes arrayed in space show market structures, though, as the figures below show us.

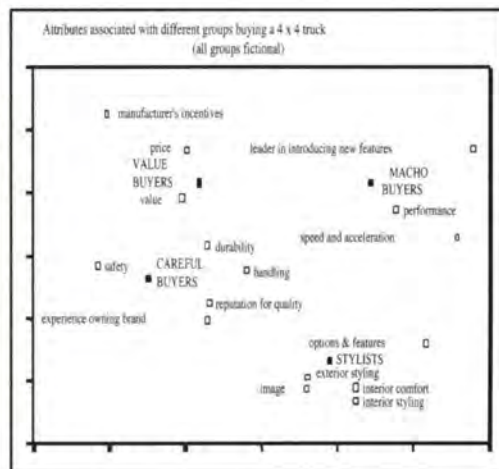
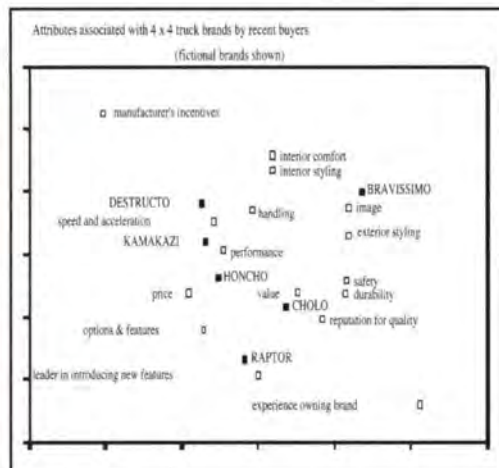
The top chart shows one type of market. This map represents brands and perceptions about them. The really basic idea behind the map is: "What appears together goes together." Attributes that fall close to a brand are strongly associated with that brand. Attributes that fall together have similarities with each other. Brand that fall closest to each other have similar patterns in ratings.

The map on the bottom shows groups in the marketplace, and possibly even market segments (if we can find them and reach them selectively in some way). Showing what is important to various groups of buyers (or even segments) typically does not count as market structure analysis — at least when we are being pure and right about things.

Sometimes, mapping — at least various maps like the one on the top — is most of what gets called market structure analysis. So if somebody who can make life difficult (e.g., a client, a boss, or a boss's boss)

asks for a market structure analysis, you do not need to panic immediately. They may just want some maps. Of course, they might even want something entirely different that is not market structure analysis at all according to the generally accepted rules. (Then you can panic.)

Non-spatial approaches can work well to show behavioral data, as may be readily apparent. For example, analyses of product or price cross-elasticities often lead to displays that are not at all like maps, such as the simulator programs that you can cre-



the non-spatial. Spatial techniques are used often with data based on judgments (opinions, perceptions, ratings). These work well with various maps, or as they are known in formal circles, "continuous dimensional market structures."

The simplest spatial techniques give a picture of market boundaries as separate clusters of products in two-dimensional space. Some judgment then is made about distance between clusters as determining where a market stops and starts.

Other maps are quite familiar to many of us — for instance, the type



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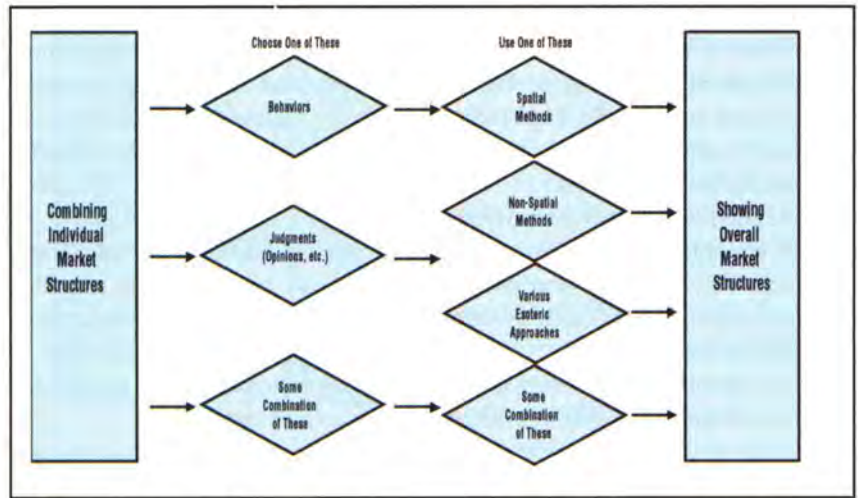




ate based on a choice-based modeling study. Simulators can look very impressive if you have a good programmer working on them — and can do great things with “what-if” types of questions about changing product configurations. However, they have nothing faintly map-like about them.

**More on showing structures: mixed and other methods**

Data based on behaviors and data based on judgments data are not, of course, mutually exclusive. They often provide important insights when combined. For instance, brand-switching studies typically involve both behavioral and opinion-based data. Brand switching, by the way, can be considered as falling under either “product substitution” or under “market impact.” (As you may recall, those were mentioned as two of the possible bases for organizing market structures a few sections ago.)



More academically-oriented practitioners have investigated various “latent” structures presumed to exist in markets. Sometimes these are latent classes, which in some ways resemble market segments. Sometimes, these are causal models or path diagrams. Because there can be diagrams involved, some call these forms of mapping. Others do not. How to categorize these method remains problematic.

A flow chart summarizing this step is shown above.

**A few factors sometimes overlooked**

In addition to price elasticities, many other factors aside from judgments can enter into market structure analysis. These sometimes are overlooked, and include:

- purchasing time or purchasing cycles;

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• intermediaries between sellers and buyers (not just outlets, but such specialized groups as formulary committees for pharmaceuticals, regulators, insurance companies, and so on);

• geographic distribution;

• so-called exogenous or environmental variables such as the state of the economy; publicity and public opinion; governmental activity outside regulation, etc.

Also, models can be explicitly dynamic (attempting to predict change over time) or static (a snapshot of a given situation). Different methods are more suited to each basic approach. Dynamic approaches that take just a step or two into the future include market simulator programs. Other dynamic approaches that try to peer further into the future include product diffusion models, and an incredible array of forecasting techniques, probably even including the crystal ball.

#### **More about market structures versus market segments**

Most authorities do not consider

market structures to be the same as market segments. In fact, doing a thorough job with market segmentation generally requires so much time and effort that you cannot get the full story on market structures in the same interview.

Here's the mantra on segmentation, in case you are wondering why this tends to fill most of an interview. Finding segments almost always is taken to mean looking for groups that fit these three criteria:

• each has defined product-related needs different from those of all other groups;

• each can be characterized or identified;

• each can be reached selectively (or "targeted") with communications and marketing efforts. (Or at the very least, the segments you care about have to be groups you can reach selectively.)

Here we are putting aside the idea of "a priori segments," which are defined before looking at any data. Sometimes groups defined in this way in fact turn out to be segments, and many times

not.

For instance, many banks used to segment customers based on the area of the bank that handled their business. There could be various lobby areas for the more indigent, some executive and professional areas, and finally the "upstairs," where all the big-money people got to visit. One major bank had seven such "customer centers," and they solemnly believed that each served a segment of the market. They believed this, that is, until they did a fairly thorough analysis of their customers' needs. When they did, they found only three distinct groups. Their segments were convenient and supported a long tradition, but they were wasting a lot of time developing separate sets of services for all of them.

In any event, if you do find segments, market structures may exist within market segments, just as they can within any group. Different segments of a market may structure a market differently — and indeed we would expect them to do precisely this, since their needs are different.

Many other structural concerns can differ for various segments, as well. For instance, different structural constraints may apply to some market segments, and not others. We need only think of such examples as different groups having differences in insurance coverage, or different groups having access to different public services (like transportation) to see that these environmentally-imposed limitations may be crucial factors in understanding how segments work.

For these reasons, market segmentation and market structure analysis can appear in the same study. As we said earlier, though, given the capacity of most human beings to endure interviews without certain illegal recreational substances, it is hard to do justice to both issues at the same time. Almost invariably, all-in-one studies will skimp in some way on segments or on structures. Just to be fair, we should add that a few academics now claim that both segmentation and marketing structure analysis can be done

## **Size Matters**

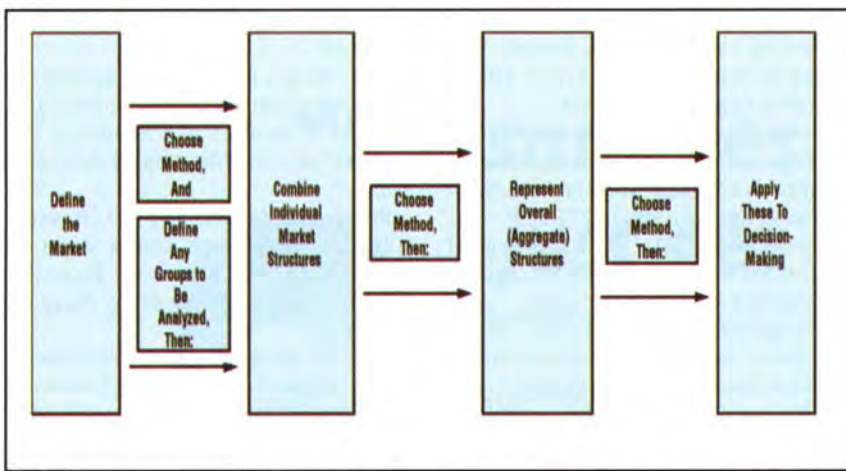
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at the same time, and everything comes out fine. This may happen sometimes, but how often it works remains to be proven.


Finally, as many of you have observed, some practitioners confuse segments and structures so much that the line between them is nearly obliterated. You can have a conversation with some of these people and, at the end, not only will you not know what they are talking about, but you will feel confused about both subjects. We

only hope that we have left you in somewhat better condition by the time you have reached this point of the article.

**Review: basic steps in getting to market structures**

It all seems simple when summed up in a nice diagram like the one above, but the problem of market structures is both large and complex. As the reference list at the end of this article suggests, you may get an

entirely different answer about what market structure analysis absolutely needs to include, depending on the experts you consult.

Writing this article, your author tried as much as possible to keep to a central path, and not follow anybody's pet theories to the exclusion of others. This also represented an earnest effort not to make your feet fall asleep from the sheer excitement of reading about the topic. Tastes vary, though, and if that is just what you wanted, taking a careful look at the reference list below may provide just what you expected. 

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## Data Use

continued from p. 18

sumers? In a pharmaceutical marketing research study, for instance, we ask how physicians perceive drug X's attributes such as efficacy, dosing, and cost. The feedback provided by physicians can be used in concept testing, designing clinical protocols, making marketing decisions and enhancing marketing efforts.

2. What profile, or combination of attributes, is deemed most attractive to consumers? In a pharmaceutical marketing research study, for instance, the question would be: Do physicians consider a drug with fewer side effects, lower efficacy, higher cost, and more difficulty of administering more attractive than a drug with more side effects, higher efficacy, lower cost and ease of administration?

3. What is the share of preference for the new product? For instance, a pharmaceutical company intends to introduce a new drug in an already crowded therapeutic area. It wants to assess how the new drug will perform in comparison with the existing drugs and how share of preference of the existing drug changes as a result

of the launch of the new drug.

### Design

The design is the first and crucial step in developing and implementing a conjoint study. In this article, we'll focus on the general perspectives of the design rather than elaborate on the details of the design issues. (See Kuhfeld, et al., 1994 for more discussion on this issue.) There are largely three steps in designing a conjoint study: (1) determine the number of attributes and attribute levels; (2) determine the number of profiles; and (3) calculate the sample size.

#### 1. Determine the number of attributes and attribute levels

For evaluating a product, the first thing is to decide the number of attributes and levels of each attribute.

A level here refers to the value of the attribute. For instance, an attribute of "price" could have three levels: \$10 per day, \$15 per day and \$20 per day. Table 1 shows a profile of conjoint card with five attributes.

A common approach to selecting attributes and attribute levels is through a focus group. For a conjoint study in the pharmaceutical industry, a focus group usually consists of a panel of experts in the study areas or consumers of products (e.g., physicians or patients) from whom the list of attributes and attribute levels are elicited. This phase of qualitative marketing research is crucial not only for generating the appropriate list of attributes and attribute levels, but also for helping determine whether a sufficient amount of information has been included so that physicians or

**Table 1 - Full-Profile Conjoint Card**

*Sample conjoint card with five attributes, each at a given level. Physicians are asked to rate or rank these cards.*

Attribute	Level
Price	\$10; \$15; \$20 per day
Dosing	QD; QID; BID
Side Effect	High; Medium; Low
Efficacy	High; Medium; Low
Administering	IV; Oral

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patients can respond to the profiles in a meaningful way.

The guideline for selecting attribute and attribute levels is straightforward: They must be unambiguous and actionable. In other words, they should be clear and precise in expression and meaning, and can be implemented in practice and reality. Unimportant attributes and unrealistic attribute levels should be identified and eliminated with caution.

#### 2. Determine the number of profiles

Before we determine the number of profiles, let's first briefly review the concept of full-profile design.

##### *Full-profile design*

Once the attributes and attribute levels have been determined, we start



to generate a variety of combinations of the attribute levels, each different from another. For instance, for an attribute of "price" with three levels (\$10, \$15 and \$20) and an attribute of dosing with three levels (BID, QID, and QD), we have a total number of nine combinations ( $3^2=9$ : the base is the number of levels and the exponent is the number of attributes). In a conjoint study, each of the combinations is named "profile" (also termed "task" or "run") and thus a design including all combinations is called full factorial design. For four attributes with three levels each and additional one attribute of two levels, we have a total of full-factorial 162 profiles ( $3^4 \times 2^1 = 162$ ). In a full factorial design, all main effects of attributes and the interactions among them can be estimated.

In a typical conjoint analysis, a consumer (e.g., a physician) is asked to rate the likelihood of purchasing the product (e.g., prescribing the drug) upon seeing each profile. Obviously, there is quite a cognitive burden on consumers to rate each of 162 profiles. It has been well documented that a consumer should rate no more than 30 profiles at any given time. A product may have more than five attributes and in today's competitive market, the number of attributes in a marketing research study could be well above 10. As a result, the total number of profiles based on a full factorial design is usually too large. As such, a fractional factorial design is usually used.

A fractional factorial design selects only a subset of the profiles based on a full factorial design so that the number of profiles can be handled relatively easily by respondents, while each attribute and the attribute level can also be assessed adequately. Thanks to the advance of computer technology, most statistical packages such as SAS, SPSS, and Sawtooth (CVA, 2000) can generate fairly quickly a fractional factorial design. Two criteria that are frequently mentioned in literature in evaluating a fractional factorial design are orthogonality and balance. The former

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refers to a design where the effect of each attribute can be evaluated independently. This is important because only by an orthogonal design will the effects will be uncorrelated to each other, thus avoiding possible confounding problems. The balanced design refers to the design in which levels of attributes are equally represented in the design, so that the effects are also uncorrelated with the intercept and the design becomes more efficient.

#### *The number of profiles*

How many profiles do we need to have from a fractional factorial design? There is no absolute number to follow; the answer depends on the number of attributes and attribute levels, as well as the level of efficiency for the design. It is generally perceived that if there are  $n$  attributes with an average of  $k$  levels, we need to have  $n(k - 1) + 1$  parameters and the total number of profiles equals to about 1.5 times of the number of parameters. With five attributes hav-

ing three levels of each, for instance, there would be 11 parameters ( $5(3 - 1) + 1$ ) and thus about 16 tasks to complete.

Here, we give a rough range of the number of profiles rather than a concrete number to follow. This is because when a fractional factorial design is implemented, the choice of the final number of profiles depends on other factors such as the efficiency of the design itself. Briefly, the efficiencies refer to the measure of design goodness. For those who are interested in knowing about the efficiencies, please see the paper by Kuhfeld et al (1994).

The number of profiles increases for a segmental experiment. For instance, in evaluating the effects of a headache treatment, the three types of patients (tension, migraine, and cluster) may be identified, and they differ in the types of treatments received. If we want to hold their treatment type constant across the attributes and attribute levels, we would need three times more of the

number of profiles we have generated.

The numbers of levels of the attributes should be about equal. Consumers may place high value on the importance of an attribute with many levels. Therefore, an attribute with more levels may be weighted more important than an attribute with fewer levels. (Wittink, Krishnamurthi and Reibstein, 1989). The importance of an attribute with more levels will be inflated.

#### *Rating and ranking methods*

There are many different types of methods for assessing consumers' preferences for a certain product. Among these, rating and ranking are frequently used with conjoint studies.

Rating methods, as noted by marketing researchers (Green, and Tull, 1978), are some of the most popular and easily applied data collection methods. In a conjoint analysis, for instance, a physician is asked to indicate the likelihood of prescribing that product upon seeing each profile. The rating scale ranges from 1 (definitely no) to 7 (definitely yes). Other rating scales, from 1 to 5 or from 1 to 9 are also used as well. The ranking method, on the other hand, requires physicians to order each of the profiles based on the likelihood of prescribing the product. If we have a total of nine profiles, all profiles will be ranked from 1 to 9, with a lower number usually indicating the product most likely to be prescribed by the physicians. Usually no ties are allowed.

#### **3. Sample size**

The sample size required for the conjoint analysis is debatable because there is no definite rule to follow.

Before we calculate the sample size for a conjoint analysis, we need to calculate the number of parameters. As mentioned earlier, usually the total number of parameters is equal to the total number of levels (all levels for all attributes combined) minus the total number of attributes plus one. For example, say we have four attrib-

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utes with three levels for each and one attribute of two levels (see the example in Table 1). We would have a total of 14 ( $3 \times 4 + 2$ ) levels. We then have 10 parameters ( $14 - 5 + 1$ ).

The rule of thumb for the ratio of the number of parameters to the number of respondents is between five and 10. In other words, if we have four attributes with three levels each and one attribute of two levels, we then need at least 50 physicians ( $10 \text{ parameters} \times 5$ ) to complete the study. If we have 10 attributes with three levels each, we then have 21 parameters ( $30 - 10 + 1$ ) and need at least a sample size of 105. Most researchers in conjoint analysis agree that we need probably at least 70 to 100 respondents to make the results stable.

### Data analysis

#### Utilities

In a conjoint analysis, a consumer's preference (rating or ranking) is the dependent variable and product attribute levels are the independent variables. Note here that the dependent variable can also be a binary preference intention (e.g., yes versus no) or constant sum (e.g., For the next 10 patients you are going to treat, how many patients you are to prescribe this drug?). The coefficients in the regression model are the estimated part-worth utilities. As in a regression analysis, the R-square gives an indication on how the data fit the model. The R-square tells the proportion of the variance of the consumer's preference that is explained by the combination of the independent variables (attributes and attribute levels). While its values range between 0 to 1, a high value of R-square would indicate the data fit the model well. On the other hand, if the R-square is low, there is an indication that data may not fit the model well, either because there are some errors in the data collection or some inconsistency while consumers perform their rating or ranking tasks.

#### Relative importance of an attribute

The relative importance value

shows how important an attribute is in affecting consumers' preference for a product. It is derived from the part-worth utilities for each attribute. First, the range of the attribute is computed for each attribute by subtracting the smallest part-worth utility from the largest one; second, the total range is computed by adding the ranges for all attributes together; third, the relative importance value is computed by dividing the range of the attribute by the total range.

#### Metric and non-metric

Two methods that are frequently mentioned in literature are metric and non-metric. The key difference between metric and non-metric conjoint analysis lies in how the dependent variable (rating or ranking) is transformed. For metric conjoint analysis, a linear transformation is performed and the original rating or ranking data is unchanged. For non-metric analysis, a monotone transformation is conducted. In this

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monotone transformation, the order of the rating/ranking is preserved but the data have been transformed to make the model fit better. For these reasons, the  $R^2$  in non-metric conjoint analysis is always higher than that of metric analysis; however the former is also less stable than the latter. In general, metric conjoint analysis is used more often than non-metric conjoint analysis.

### Validation

In quantitative marketing research, we often need to validate the model. In a common regression model, for instance, we may develop a model based on the first group of 100 consumers. We then apply the regression coefficients derived from the model to the second group of consumers. The high correlation between predicted value and actual values for the second group will indicate that the model has good predictive power. Similarly, we can also do it in conjoint analysis by using "holdout observations."

In conjoint analysis, the observations used for developing a model are commonly referred as "actual observations," which is different from "holdouts."

Holdout observations are used to validate the model and to calibrate

the simulator. The profile for validation is a hypothetical product that is rated or ranked by consumers but is not used in the estimation of utility values in the model. The purpose of having holdout observations is to determine internal validity of the model by examining the associations between the actual and predicted ratings for these observations. Usually, the number of holdouts is small because these profiles, though not used in estimating the model, add to the burden placed on respondents. We should not increase unnecessarily the burden on consumers when they are performing tasks. These holdout observations are normally derived from those that are included in a full-factorial design but not in fractional factorial design. In the example we referred to earlier, there are 81 profiles for a full-factorial design with four attributes with three levels each. If the fractional factorial design only has the 24 profiles selected from the 81, the holdout observations will be derived from the 57 remaining profiles that are left out.

The validations assessed through the holdout observations are calculated based on the magnitudes of correlation coefficients between the predicted values of these holdout observations and their actual values. The

ranges of correlation coefficients are between  $-1$  to  $+1$ . In the evaluation of the validity of model, a positive moderate magnitude of correlation coefficient is usually needed. Note that the magnitude of the correlation coefficient depends on many other factors such as sample size (in this case the number of holdout observations and the number of profiles) and variation of the predicted and actual values. Another indicator for the assessment of the model would be the p-value associated with the level of the significance (e.g., .05 or .01).

### Simulating market share

As we have indicated earlier, one of the objectives in using conjoint analysis is to simulate market share. In other words, after the model is developed, we want to know how many times a consumer will purchase the new product, or in the example cited earlier, how many times a physician will prescribe the drug. Note that a simulation of market share can be performed both for a new product and for an existing product.

In a conjoint study, the overall utility score associated with each drug is calculated based on the utility values of each attribute level for that drug. One way to simulate the market share is to assume that physicians will prescribe the drug with the highest utility value. It is particularly useful for a hypothetical product because the simulator predicts how physicians will react to changes in certain attribute levels based on the utility values estimated from the model.

### Limitations

1. Conjoint analysis applies a regression model which uses attributes and attribute levels to predict the likelihood of purchasing a product. In the model, we have to decide the attributes and attribute levels that are identifiable and important to the consumers. In a research project for a pharmaceutical manufacturer, for instance, we identify those attributes such as price, efficacy, side effects, etc., that are important in physicians' decisions to prescribing drugs.

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However, in defining the attributes and levels, we may not be as inclusive as we should.

2. Conjoint analysis is mainly concerned with main effects. It ignores the possible interaction effects among the attributes and levels. For instance, price and brand interaction (i.e., different brands may have different price sensitivities) is difficult to estimate in a traditional conjoint study.

3. When the number of attributes and attribute levels gets very large, it is difficult to justify the use of traditional conjoint analysis. In such cases, we either have to use a special type of conjoint analysis such as adaptive conjoint (Sawtooth, 2000) or we have to increase the sample size so that the rating or ranking tasks can be divided among the respondents. See Johnson (1991) for more on adaptive conjoint analysis.

4. Conjoint analysis usually requires that the number of levels for each attribute is about equal. For instance, if one attribute has two levels and the other six levels, the range of utility values for the six-level one will likely be higher than the two-level one simply because one attribute has more levels than another.

5. Conjoint analysis usually dictates that the values of levels are the same across the attributes. For instance, one of the requirements in using conjoint analysis is that the levels of price are the same across the drugs, which is sometimes not the case. For this reason, a discrete choice modeling is suggested, which we will discuss in another article. (4)

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## Survey Monitor

continued from p. 8

Port Washington, N.Y., research firm. The firm's PharmTrends unit conducted a survey among more than 12,000 individuals which confirmed that consumers agree Rx drug advertising helps them take more control of their personal health care and motivates them to request specific drug brands of their physicians.

"When it comes to health care, consumers are telling us that they want to be more informed of their treatment alternatives," says Fariba Zamaniyan, senior account manager of NPD PharmTrends. "This is evidenced by their positive response to Rx-branded drug ads. But the key to success for Rx drug advertising is whether or not the ads prompt doctor visits, generate prescription fulfillment for that drug, and improve patients' likelihood to comply with their recommended drug therapy."

The study indicates that consumers aren't flocking to their doctor's office because of an Rx drug they became aware of through advertising. Only 11 percent of the consumers interviewed report they were actually prompted to make a doctor's appointment to inquire about the Rx drug they saw advertised. Not surprisingly, two-thirds of consumers who were prompted to visit

their doctor because of a prescription drug advertisement had Rx drug insurance.

Although consumers may not be making appointments to talk specifically about drugs seen in advertisements, they are communicating with their physicians. NPD's data show they do discuss the Rx drugs they became aware of through advertisements. Nearly a quarter of the respondents asked their doctors about specific Rx drugs they learned about through

### Top Categories For Rx Brand Drug Recall

(Rank based on percent of buyers that recalled an advertisement for an Rx brand within that category)

Rank #	Category	% Rx Brand Buyers With Ad Recall
#1	Allergy	67%
#2	Cardiovascular	33%
#3	Behavioral disorders	33%
#4	Gastrointestinal	33%
#5	Female health	30%

direct-to-consumer (DTC) ads.

Not all consumers agree that Rx drug advertising is beneficial. Thirty-eight percent of consumers interviewed feel that there is too much advertising for these products. One-third said that the advertisements are too confusing and that they would not like to see more Rx drug advertising in the future.

Certain categories have higher ad recall among consumers. Nearly three-quarters of the patients on a Rx allergy medication recalled an advertisement for their drug. The top-ranking categories for ad recall levels are shown in the accompanying table.

"Consumers who are suffering from a disease or condition are more interested in what the Rx drug advertisements have to say," says Zamaniyan. "Therefore, we see a correlation between prescription sales and ad recall."

NPD PharmTrends confirms that Rx and over-the-counter (OTC) drug sales have seen steady growth. The strongest year for DTC Rx advertising was 1999, which helped drive Rx growth by 18 percent year over year. In the year ending September 2000, sales growth remained brisk but was slightly less than the peak in 1999, +9 percent.

Consumers who purchase Rx drugs as part of their treatment regimens report high levels of ad recall for that Rx medication. For example, Viagra tops the list for ad recall among buying consumers. Ninety-two percent of the consumers who purchased Viagra recalled seeing an ad for the brand.

### Top Recall Levels For Rx Brand Drugs Purchased By Consumers

(Rank based on percent of buyers that recalled an advertisement for that brand)

Rank #	Rx Brand
#1	Viagra
#2	Claritin/D
#3	Allegra/D
#4	Prilosec
#5	Ortho-Tricyclen
#6	Lipitor
#7	Detrol
#8	Flonase
#9	Paxil
#10	Zyrtec

"With more 'blockbuster' brands going off-patent in the next few years, it will be more important than ever for drug manufacturers to raise awareness for existing and upcoming formulations," says Zamaniyan. "Consumers are receptive to what drug manufacturers have to say about their brands, particularly if they or a family member suffer from the ailment. Drug companies who can use Rx advertising effectively to convert consumers to

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well-informed buyers and build long-term loyalty will be most successful. These companies should therefore continue to support the use of DTC advertising in their market." For more information contact Fariba Zamaniyan at 516-625-2321 or at fariba\_zamaniyan@npd.com.

## Doctors prefer to see specialty sales reps

Ninety percent of physicians prefer to be visited by specialty sales representatives, according to "Specialty Reps: A Growing Force," a new study by Scott-Levin, a Newtown, Pa., consulting firm.

The almost 6,000 doctors from 21 specialties participating in the study felt that specialty reps know more about specific therapeutic areas as well as current and competing products. Most physicians (84 percent) said a specialty rep's detailing presentation has at least some impact on their decision to prescribe.

Other highlights from the physician section of the study:

- Almost all the doctors (97 percent) see about 10 reps per month. On average, 62 percent of those are specialty reps.
- One-third of physicians expect their need for specialty reps to increase over the next two years, while 62 percent expect it to stay the same.
- Oncologists, neurologists, and dermatologists are the specialists most likely to say they prefer to see specialty reps. Pediatricians are the least likely.
- About 32 percent of doctors say specialty reps' presentations have "quite a bit" or "a lot" of impact on their decision to prescribe. Another 27 percent say they are "very likely" or "extremely likely" to prescribe a particular product after a detail from a specialty rep.
- Almost 60 percent of physicians say that being detailed by a specialty rep makes it more likely that they will prescribe the drug.

Some key findings from the rep por-

tion of the study:

- Specialty reps tend to have at least two years of experience and usually are recruited from a company's general sales force, according to specialty reps from the companies with the 20 largest specialty forces.
- Over half (56 percent) of the specialty reps are assigned to more than one therapeutic area or drug class.
- Specialty reps make an average of nine sales calls per day, and most detail two to three products at each call.
- When the doctor is not available, specialty reps see nurses about half the time. Of the reps who call on non-physician staff members, most feel their meetings with nurse practitioners (61 percent) and physician assistants (57 percent) are extremely productive.

The overwhelming majority of specialty reps (88 percent) say they were trained separately from general and primary care reps. When asked which aspects of training were most helpful in dealing with physicians, specialty reps mentioned product and disease knowledge, advanced selling and communi-



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## Catalogs still an important sales tool for retailers

Amazon did it. So did Nordstrom. Even Toys R Us got into the game. This year, retailers of all stripes blended e-commerce with tried-and-true "old economy" marketing tools. Catalogs are fast becoming a tool of choice for many e-tailers to drive customers to Web sites. Not online catalogs, but the good old-fashioned paper kind, which are being revamped for the new economy.

An online survey by San Francisco market research firm King, Brown & Partners (KB&P) revealed that 79 percent of those who purchased gifts online this past holiday season received a catalog in the mail from an online retailer, and that 72 percent said catalogs were "very" or "somewhat" useful when making online purchasing decisions. Catalogs also encouraged nearly two-thirds (62 percent) who received a catalog to buy from the company who sent the catalog and of those, 89 percent purchased online.

Mixed e-commerce models have other advantages. When retailers reach customers using two or more channels they tend to be far more profitable than store-only or online-only customers. Eddie Bauer, for example, has 570 stores, ships 110 million catalogs per year and runs four Web sites. The company found that shoppers who use all three methods spend five times more than those who shop only by catalog.

The study also revealed that online shoppers were strongly influenced by brand awareness last holiday season. Online shoppers overwhelmingly purchased from unfamiliar sites — as long as they had familiar brand names.

A survey among 1,178 respondents showed that a full 71 percent of online shoppers bought at sites they had never purchased from before; the same proportion (71 percent) were familiar with the brand and almost two-thirds (64 per-

cent) felt that knowing the brand name beforehand was "very" or "somewhat" important.

"When attracting new customers, brand familiarity is critical," says Hal King, CEO of KB&P. "Retail brands that have built their reputation over many years in the bricks-and-mortar arena have an enormous advantage over pure-play dot-com companies whose brands are relatively new to consumers."

King believes the holiday shopping survey points to the need for continued branding initiatives consistently updated and tracked for effectiveness. "Even with the speed of the New Economy, the best brand strategies are long-term, consistent and sustainable — and they take time," says King. "The biggest mistake New Economy companies can make is to abandon brand building altogether. Online shoppers are willing to give new companies a chance as long as they've heard of them." To obtain the complete study visit [www.king-brown.com/pressframe.htm](http://www.king-brown.com/pressframe.htm).

## What drives switching of cold-remedy purchases?

A ShopperInsight study, conducted by Harris Interactive, Rochester, N.Y., found that price is substantially less important among supermarket shoppers who switch to drug stores for purchasing certain products vs. among those who switch to discount stores.

The nationwide study conducted among 5,797 respondents in late February and early March tracked retailer switching behavior for over 40 consumer packaged goods categories. Respondents who switched away from their primary supermarket for particular product categories were asked why they switched. The reasons cited, and the emphasis placed on those reasons, differed strongly by class of trade.

The study finds that among supermarket shoppers who reported purchasing a cough and cold remedy somewhere in the last six months, 30 percent of them prefer to purchase the category at their primary supermarket (converted), while 70 percent prefer to go elsewhere (unconverted); 30 percent prefer to purchase cough and cold



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remedies in discount stores, 26 percent in drug stores, 9 percent in a supermarket other than their primary, and 5 percent in another class of trade.

Not surprisingly, price is the most frequent reason that supermarket shoppers switch to discount stores for

**Percent of shoppers citing key reasons for switching retailers for cough and cold remedies**

**% Switch to Discount Stores**

- 94% - To get lower prices
- 31% - For better specials
- 29% - For a wider selection
- 20% - To get their brand
- 13% - To get better pack sizes

**% Switch To Drug Stores**

- 39% - Lower prices
- 37% - Wider selection
- 26% - Specials
- 19% - Faster service
- 13% - Better pack sizes

**% Switch To Other Supermarkets**

- 90% - Lower prices
- 43% - More convenient hours
- 40% - Wider selection
- 14% - Specials
- 12% - Better pack sizes
- 12% - Carries my brand

cough and cold remedies. A whopping 94 percent of switchers to discount stores cite price as a reason for switching, compared to 29 percent who say wider selection motivates them to switch to discount stores. By contrast, shoppers who switch to drug stores to buy cough and cold remedies are half as likely to consider pricing issues (39 percent) as switchers to discount stores — making wider selection as important as pricing.

“As retailers struggle to capture their markets, they must strike a balance among price, selection and service,” says Peter Gold, vice president and director of consumer package goods research at Harris Interactive. “Customers’ reasons for going elsewhere to buy are very specific. This study makes it clear that while supermarkets may find it hard to compete on price, they, and their customers, may benefit from placing greater emphasis on their product assortment — particularly for categories such as cough and cold remedies, where drug stores pose serious competition.”

## Outfitting the pharmacy of the future

What should the drug store of the future offer its customers? An on-site nurse practitioner was the top choice, according to the AmeriSource Index, a new nationwide quarterly survey released by AmeriSource Health Corporation, a Valley Forge, Pa., distributor of health care products and services. The survey covered a range of topics including purchasing medications over the Internet, the use of herbal medicines, why people use a particular pharmacy and whom people go to for advice on medications.

When presented with a list of products and services that they would most like to find in the pharmacy of the future, 30 percent of respondents chose an on-site nurse practitioner. When asked what their second top choice was, nutrition counseling and a nurse practitioner tied at 15 percent. A specialist on different diseases came in next, at 14 percent. Other top contenders for second place were kiosks with medical or diagnostic information, at 12 percent, and weight loss counseling, at 8 percent. Chiropractors and masseuses followed, with 7 percent and 5 percent respectively.

While Internet purchases have increased in recent years, the vast majority of survey respondents — 64 percent — said they had not purchased medications over the Internet and did not intend to do so in the future. However, when asked what might encourage them to do so, the ability to order from a local pharmacy online drew the largest number of responses — 21 percent. Next were lower prices (20 percent), convenience and improved security (12 percent), at-home delivery of orders (10 percent) and obtaining Internet access (3 percent).

Waiting to have a prescription filled was an experience just about all respondents shared. Twenty-nine percent of those surveyed reported an average wait of more than 20 minutes. Eighteen percent said they usually waited 11-15 minutes, while 19 percent said they waited six to 10 minutes. Only 13 per-

cent of respondents reported waiting five minutes or less.

The AmeriSource Index polled 1,034 consumers nationwide about their medication-purchasing habits and preferences. It was conducted by Opinion Research Corporation International on behalf of AmeriSource Health Corporation.

What is the most important factor in selecting a pharmacy? A convenient location, according to 26 percent of the survey respondents. Low prices came in next, at 20 percent, followed by “trust” and “personalized attention and service” at 15 percent.

Among respondents 55 and over, who purchase more medications than any other group, the results were different. Trust ranked even higher among respondents 55-64. In fact, 23 percent said this was their top criterion. Among senior citizens (64+), personal attention also ranked high, with 20 percent of seniors selecting this as the key reason to choose a pharmacy.

Pharmacists also ranked second only to physicians when people seek advice about medications or medication interactions, according to the survey. When asked whom they were most likely to consult about these issues, 48 percent of respondents chose physicians, while 37 percent chose pharmacists. Among adults 35 to 64 years of age, pharmacists were the top choice, while women were almost evenly split, with 45 percent choosing physicians and 44 percent selecting pharmacists.

Lastly, the survey questioned people about their use of herbal and homeopathic medicines. While 27 percent of respondents said they did take these products, nearly two thirds of those who reported using herbal or homeopathic products said they did not inform their pharmacists about it. Herbal and homeopathic products were used most by adults ages 35-54. This group was also the least likely to inform pharmacists about the use of these products.

The AmeriSource Index is a quarterly survey of trends, purchasing behaviors and opinions about pharmacists and their customers. Future surveys will be released on a quarterly basis. For more information visit [www.amerisource.com](http://www.amerisource.com).



## Qualitatively Speaking

continued from p. 16

the Internet environment, whereas in a live focus group, this individual is integral to the flow and dynamics of the group setting.

• The security of the Internet focus group is not nearly as tight as it is with live sessions. As a result, you never know who you are really talking to in the Internet environment as opposed to a live situation where participants must have photo identification to be considered for the group.

• The Internet approach to focus groups relies on an individual's ability to type effectively in order to be an active participant in the session. This is very problematic, as there is a very wide variation in the typing abilities of the population, and probably even greater variation in the ability of people to clearly articulate their ideas using a keyboard. This problem is further compounded by the fact that the Internet environment requires the

participant to read the material that is coming to them: reading skill levels also are quite varied among the U.S. population.

• One of the most important benefits of the traditional focus group is the ability of the clients to be involved in the research real-time by observing from behind the one-way mirror. Not only does this enable them to see what is happening, but it also permits them to communicate with the moderator so their ideas can be considered as the group(s) progress. While it is possible for clients to read the inputs from an Internet session as they come in, it is not the same as being able to see the participants' reactions to specific ideas, and to get a sense of the feelings of the individuals relative to the topic areas being covered.

• Another important benefit of traditional focus groups that does not exist with the Internet version is the ability to show external stimuli to the people in the groups in order to obtain their reactions. While it is possible to

send images over the Internet to people to obtain their reactions, in the current state of the technology, there can be major problems in terms of both the quality of the ultimate image that is downloaded and the speed in which it is received. Further, the image is only two-dimensional in the Internet world, whereas with real focus groups, it will be the original image and, where relevant, a three-dimensional image.

In summary, while Internet research might have a future, it probably is more appropriate for quantitative studies than qualitative due to the static nature of the questioning vehicle and quantitative research's lack of a need for moderator/participant reactions. If organizations are accustomed to having high-quality focus groups conducted for them, the more they experiment with online focus groups, the greater the likelihood that this technique will fall from favor, as users recognize that the limitations of the methodology far outweigh the benefits. ☐

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## Research Industry News

continued from p. 15  
solutions.

**Total Research Corporation**, Princeton, N.J., has expanded its European operations through the acquisition of **Teligen Ltd.** Teligen, a U.K market research and consultancy company located in Richmond, Surrey, specializes in the telecommunications marketplace.

Istanbul-based **ProCon GfK**, the Turkish subsidiary of Nuremberg, Germany-based **GfK Group**, has signed an agreement for the takeover of market research organization IBS Marketing Research Services. IBS brings sales of around EUR 800,000 to ProCon GfK. Following the acquisition of IBS, the GfK subsidiary will be the second largest provider of ad hoc research services in Turkey. Overall, ProCon GfK ranks fourth in the market research sector in Turkey.

**MindBranch, Inc.**, a North Adams, Mass., research and business information firm, has acquired **Intelligex**, a New York company that matches buyers and suppliers of custom research in an online marketplace.

### Alliances/strategic partnerships

Toronto-based data management firm **Generation 5** has announced a strategic partnership with Orange, Calif.-based **SRC, LLC**. Under the terms of the license, Generation 5 will

add Canadian content to two SRC products **Allocate** and **Solocast** for exclusive distribution in Canada.

**Engage, Inc.**, an Andover, Mass., enterprise marketing software and interactive media company, has formed an agreement with **Millward Brown IntelliQuest** under which Engage will offer its customers Millward Brown IntelliQuest's **BrandImpact** research solution — a study giving online advertisers the ability to test banners, rich media and streaming ads with the same metrics that offline advertisers use to assess brand awareness, brand image, brand consideration and ad diagnostics.

**ESRI**, a Redlands, Calif.-based geographic information system software firm, has joined the **American Public Transportation Association (APTA)** as a business member. APTA business members include private businesses that supply products and services to the transit industry.

San Francisco-based **Alchemedia**, a provider of security software to prevent the duplication and misuse of proprietary information, has formed a strategic partnership with Chicago-based **SPSS MR**. SPSS MR will resell Alchemedia's **Clever Content** software as its security offering alongside its Web survey software.

Rochester, N.Y., research firm **Harris Interactive** has reached an agreement with Tarrytown, N.Y.-based **Mediconsult.com Inc.**'s **Physicians' Online (POL)** to conduct

research utilizing **Physician's Online's** Web-based community of more than 215,000 U.S. physicians.

Marketing services firm **Access Worldwide Communications, Inc.** has renewed a one-year agreement with **ACNielsen U.S.** for multicultural research services. Access Worldwide's Cultural Access Group will support the expanded ACNielsen **Homescan LA Hispanic Panel**, a research program that gains insights about the purchasing behavior of the Hispanic market. Access Worldwide provides a variety of research services for the ACNielsen Panel including: recruitment of new panel participants; hiring, training and support of field representatives; development of recruitment materials; and evaluation of key panel recruitment measures.

### Association/organization news

The **China Market Research Organization** has been formed. Its offices are located at Room 601, Building C, No. 2 Fu Xing Road, HaiDian Dist., Beijing, 100038, China. Phone 8610-6328-6882. Fax 8610-6328-6882. E-mail [mra@mx.cei.gov.cn](mailto:mra@mx.cei.gov.cn). Web [www.mra.org.cn/website/ie.html](http://www.mra.org.cn/website/ie.html). For more information contact David Li, secretary general, at [lili@mx.cei.gov.cn](mailto:lili@mx.cei.gov.cn).

The boards of directors of the **Marketing Research Association** and the **Qualitative Research Consultants Association** have formed a strategic alliance to use the

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resources of both organizations for the common good of qualitative research. A six-member task force representing the boards of both associations will coordinate a plan of action focused on strategic issues related to information dissemination, joint communication, professional competence, image enhancement, and strategic planning. The first joint project will be the presentation of a qualitative "super session" during the annual MRA conference in New York in June.

### New accounts/projects

**SurveyUSA**, a Verona, N.J., polling firm, has added WBBM-TV to the list of media clients using its flat-fee research services.

### New companies/new locations

**Modalis Research Technologies**, San Francisco, has expanded its operations in the Chicago area. The main office is now located at 1718 Sherman Ave., Suite 310, Evanston, Ill., 60201. Phone 847-570-8001. Fax 847-570-8005.

Wilton, Conn.-based **Greenfield Online** has moved to new headquarters at 21 River Road in Wilton.

**Terry Kaufman Research Initiatives**, Topeka, Kan., has opened an office in La Jolla, Calif.

Chicago software firm **SPSS Inc.** has launched the SPSS Enabling Technologies Division, based in Miami, which will partner with software vendors and other firms to develop analytical solutions.

### Company earnings reports

Westport, Conn.-based health care information firm **IMS Health** announced diluted earnings per share of \$0.19 for the quarter ended March 31, up 19 percent. Net income grew 14 percent, to \$55.9 million, while revenue rose 20 percent constant dollar and 15 percent on a reported basis to \$329.6 million, compared with the year-earlier period. All results are reported on a pro-forma basis, exclud-

ing **Erisco Managed Care Technologies**, **Synavant**, other non-strategic software businesses and one-time gains and charges.

**SPSS Inc.**, Chicago, has announced results for the first quarter of 2001. On a pro forma basis, excluding acquisition-related and other nonrecurring charges, but including the full implementation of recent accounting interpretations on revenue recognition,

diluted earnings per share and revenues for the quarter ended March 31 were \$0.03 and \$44.1 million, respectively. These results compare with pro forma earnings and revenue figures of \$0.20 and \$48.1 million, respectively, for the same period last year.

On a reported basis, diluted loss per share and revenues for the quarter ended March 31 were (\$0.77) and \$36.5 million, respectively. These reported results include acquisition-



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related and other nonrecurring charges as well as the effects of the prescribed implementation of the recent accounting interpretations, which shows the deferral of revenues related to annual and other time-based licenses from only the fourth quarter forward rather than the entirety of the previous year.

**Arbitron Inc.**, New York, announced results for the first quarter ended March 31. Arbitron was separated from Ceridian Corporation through a reverse spin-off on March 30, and began trading independently on the New York Stock Exchange on April 2. The company reported revenues of \$60.2 million, an increase of 8.4 percent over revenues of \$55.5 million for the first quarter of 2000. Earnings before interest and taxes (EBIT) for the quarter were \$27.3 million, compared to \$24.3 million for the first quarter of 2000, a 12.2 percent increase. Net income for the quarter was \$16.3 million, compared with \$14.7 million reported during the same period of 2000, an increase of 10.8 percent. Pro forma net income per share was \$0.56 (basic and diluted), compared with \$0.51 per share in 2000, a 9.8 percent increase. Pro forma net income per share has been adjusted to reflect the one-for-five reverse split, which became effective following Arbitron's reverse spin-off from Ceridian. Arbitron reported EBITDA of \$28.4 million for the first quarter, an 11.7 percent increase over EBITDA of \$25.4 million reported in 2000.

St. Petersburg, Fla.-based **Catalina Marketing Corporation** reported results for its fourth quarter and fiscal year period ended March 31. Revenue for the quarter grew 21 percent to \$113.4 million, compared to \$93.7 million in the prior year fourth quarter. Net income for the quarter totaled \$14.5 million, or \$0.25 per diluted share, compared to \$14.4 million, or \$0.25 cents per diluted share, for the prior year period.

The company's research operations, consisting of Alliance Research and the recently acquired Market Intelligence, posted a revenue increase

of approximately 45 percent over the comparable prior year period. Earnings for the research operations were equal to approximately \$0.01 per company common diluted share this quarter. For the fiscal year, the research operations contributed approximately \$0.02 per company common diluted share.

Rochester, N.Y.-based **Harris Interactive** has announced financial results for the fiscal 2001 third quarter ending March 31. The company also announced a consolidation and cost-savings program designed to offset the impact of the current economic slowdown and allow the company to meet its objective of achieving positive cash earnings by the end of calendar 2001.

The company reported fiscal 2001 third quarter revenue (including revenue from the Yankelovich custom research group acquired effective February 1) of \$15.8 million, an 11 percent increase compared with \$14.2 million in the third quarter of fiscal 2000. Internet revenue represented \$7.5 million or 47 percent of total fiscal 2001 third quarter revenue, as compared to \$6.5 million or 46 percent in the fiscal 2000 third quarter. Net loss was \$0.17 per share (\$5.9 million), flat when compared to the third quarter of fiscal 2000.

Harris Interactive has stepped up its cost-cutting program that includes a reduction in its national workforce by approximately 70 employees or 12 percent of its full-time professional employees. After payment of severance during the fourth quarter, annualized cost savings associated with these reductions will be approximately \$4.5 million. Additionally, the company plans to consolidate office space, reduce database development costs, and scale telephone center operations consistent with current demand. When fully implemented, the employee reduction and office consolidation program is expected to reduce the company's cost base by approximately \$10 to \$12 million. Management expects this process to be completed within six months.

Princeton, N.J.-based **Opinion Research Corporation** reported

record revenues and net income for the first quarter of 2001. For the quarter, revenues were \$46 million, an increase of 18 percent compared to first quarter 2000 revenues of \$39 million. Net income for the first quarter increased to \$1.1 million, an increase of 36 percent compared to first quarter 2000 net income of \$784,000. Operating income for the quarter was \$3.4 million, an increase of 21 percent compared to \$2.8 million last year. Diluted earnings per share for the first quarter were \$.18, an increase of 12 percent compared to diluted earnings per share of \$.16 for the first quarter in 2000. Diluted EPS in the current quarter is based on a 22 percent increase in shares over the comparable period last year due primarily to common equity issued in the third quarter of 2000.

For the first quarter, EBITDA was \$5.4 million, an increase of 21 percent compared to \$4.5 million in last year's first quarter. Cash earnings per share (net income plus goodwill amortization expense after-tax) for the first quarter were \$.28, an increase of 12 percent compared to \$.25 last year.

For the quarter ended March 31, **Information Resources, Inc.** (IRI), Chicago, reported breakeven net income and earnings per share before restructuring and other charges. This compares to a net loss, before restructuring and other charges, of \$1.5 million or (\$0.05) per diluted share for the first quarter of 2000. Including the impact of restructuring and other charges, IRI reported a net loss of \$2.5 million or (\$0.09) per diluted share compared to a loss of \$3.6 million, or (\$0.12) per diluted share for last year's first quarter.

Revenues of \$136.3 million were 6 percent better than prior year first quarter and were a record first quarter for IRI. U.S. revenues were \$103.3 million, an increase of 5 percent versus prior year. International revenue of \$33.0 million was 7 percent better than last year, but 14 percent better in local currencies. Operating income before restructuring and other charges improved by \$3.6 million, from a loss of \$2.1 million last year, to income of \$1.5 million in the first quarter of 2001.





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## NP/4P

continued from p. 21

- new product awareness;
- early trial and adoption;
- success in the pharmaceutical marketplace.

*NP/4P paradigm — phase I:* The first research phase, in which the most effective natural positioning of a pre-launch Product X is determined. It focuses on identifying:

- provider connectivity with product attribute claims (sometimes obvious, often subtle);
- perceptions of benefits these attributes may (or may not) bring to the patient and physician; and
- the medical and personal values held by physicians with regard to specific therapeutic categories and drug classes and how these values might influence prescribing decisions.

The resultant output of phase I is a natural positioning statement and supporting messages that feature the physicians' own words.

*NP/4P paradigm — phase II:* A discrete choice survey incorporating the

results from phase I to develop an accurate model of the current market and determine how well the natural positioning of Product X will fit in with particular attention paid to potential market share and cannibalization rates.

*NP/4P paradigm — phase III:* Data mining to develop database clusters of physicians who are likely to be early adopters, brand loyalists or late adopters. The discrete choice model data is used to generate specific physician profile categories for targeting purposes and developing a forecast of product uptake.

*NP/4P paradigm — phase IV:* The capstone phase, representing a final check of the combined results of the first three phases via a qualitative evaluation of the overriding natural positioning and its supporting messages.

### Putting it to work

As an example, let's suppose a client calls several months before a new cherry-flavored analgesic syrup (Product X) is to be launched. This product, a combination of a non-habit-forming nighttime sleep aid and a pain reliever, is for

adolescent post-surgical patients. It will be marketed in an eight-hour, time-release formulation dosed at one teaspoon every eight hours for children between the ages of six and 12. The following is an example of the use of the NP/4P paradigm to develop marketing strategies in preparation for the launch of this product.

### *Phase I: natural positioning interviews*

Natural positioning requires efforts to establish a link or series of links between a product and the potential end-users. Here we are concerned with the relationships between product attributes and benefits versus end-user needs and values. In the case of therapeutic agents, attributes gain relevance because they allow the patient to achieve certain benefits (e.g., pain relief, sleep, improved healing). Individual patient benefits, in turn, become important to physicians who have a more global need for those benefits (e.g., meeting the needs of an entire patient population, satisfying the Hippocratic oath of "First, do no harm.>").

The perceived inherent value of a drug can differ depending on the needs of specific physician types and their specialties. For example, Product X may be perceived to be of importance by pediatric surgeons because its pain reduction and sleep-inducing benefits will promote faster post-surgical healing. Pediatricians, on the other hand, may see it as a means of reducing the number of call-backs that often have to be dealt with during a busy day.

This analogous information is gathered through a qualitative interviewing technique that is similar to laddering. In laddering, the moderator first elicits attributes that are important to the physician followed by a rank ordering of those attributes. Then, by raising questions about why specific attributes are important to physicians, benefits and values are identified. Through this approach, it is possible to gain a reasonably valid understanding of how high prescribers of pediatric analgesics will position Product X in their pain-relieving armamentarium.

A laddering interview for a natural positioning for Product X might proceed as follows:

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Moderator: *You indicated that you prefer an analgesic with a sleep aid to one without. Why is that important to you?*

Physician: It allows me to control pain through the night more easily.

Moderator: *Why is controlling pain through the night of importance to you?*

Physician: Well, because ultimately the patient is more comfortable overall when they can sleep through the night.

Moderator: *Why is it particularly important for the patient to sleep through the night?*

Physician: Because it improves that patient's quality of life, healing is more rapid and I feel good when I can accomplish those goals.

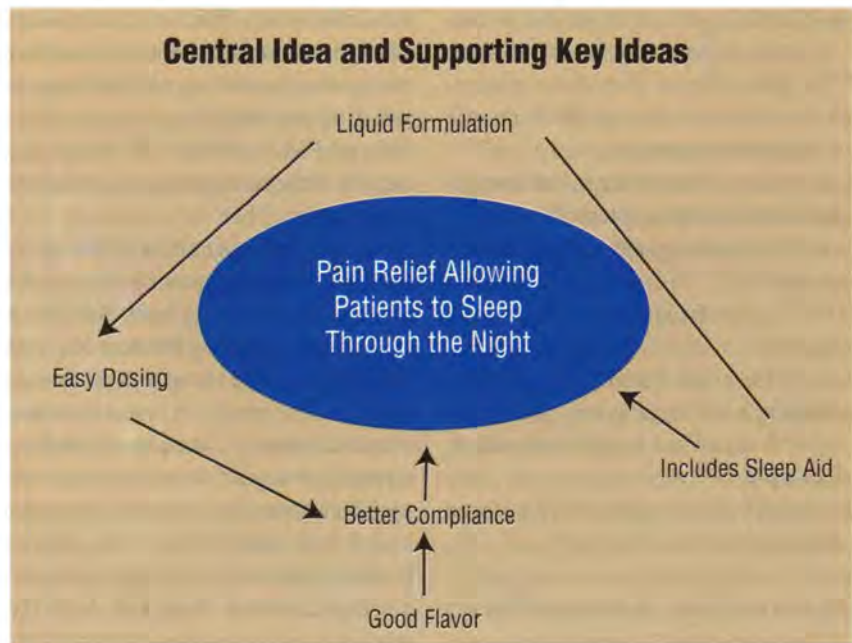
Information from this qualitative interview allows us:

- to select product attributes for further study;
- to express product attributes in the language used by physicians;
- to define the range of attribute levels and to eliminate irrelevant levels.

The success of the subsequent phase II discrete choice model survey is directly related to the quality and comprehensiveness of the information gathered during phase I. Problems can arise when attribute ranges are too narrow or too broad and/or inappropriate or when vague language causes misunderstanding among physician respondents. In other words, the proper design of the discrete choice model survey (phase II) is highly dependent on the qualitative information gathered in phase I, i.e., beware of the GI/GO (garbage in/garbage out) monster.

Before proceeding to phase II, an additional qualitative step is necessary to obtain the maximum input necessary to develop impactful natural positioning statements for Product X. This information is gathered through the use of projective techniques and one method that we have found to be particularly effective is central idea expression. In this approach, the moderator follows the attributes relationship discussion with a review of a new product profile. Utilizing the input from this product profile, the physician is instructed to complete the following steps:

1. Having read the profile, determine what is the central idea (or benefit) of



*Notes:*

*A sleep aid is part of the liquid formulation but does not cause it. Nor is a liquid formulation necessary to have a sleep aid. The current product is a pill.*

*Liquid formulation leads to easy dosing and it in turn leads to better compliance, which results in pain relief allowing patients to sleep through the night.*

*A sleep aid is not related to ease of dosing or compliance per se.*

*Good flavor leads to better compliance, but doesn't have anything to do with the other three key ideas.*

Product X that first comes to mind.

2. The physician is asked to write this central idea in a circle on a sheet of paper.

3. The physician is then asked to write all other factors (using key words) that come to mind relative to the central idea, outside the circle.

4. The physician is instructed to con-

nect related key words outside the circle with arrows that indicate a cause-and-effect directional flow culminating with the central idea benefit. (See illustration above.)

The result of this central idea expression exercise will now reflect what the most effective natural positioning and support messages for Product X will be

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and, in this case, might turn out to be:

- Natural position (the central idea): "The pain reliever that allows patients to sleep through the night."

Supporting messages:

- "Good flavor improves compliance with younger patients."
- "Whole-teaspoon dosing is easy to modify."
- "Controls pain that interferes with sleep."
- "Prevents breakthrough pain, allowing a full night's rest."
- "A liquid that is easier to swallow than a pill."
- "All-night pain relief without drowsiness in the morning."

#### *Phase II: discrete choice model survey*

Discrete choice model surveys utilize a patient allocation model in which physicians are asked to assign patients from certain sub-groups (post-operative, severe pediatric pain, moderate pediatric pain, non-surgical, etc.) to various products available for treatment. A schematic picture of the current market is generated, followed by a series of

scenarios where Product X, in various configurations, is presented as an alternative therapeutic agent. The way in which shares shift (for example from Tylenol PM to Product X) shows the impact of the new product on prescribing patterns.

If a company such as Johnson & Johnson were sponsoring this study, cannibalization of Tylenol PM Elixir and Simply Sleep by Product X could both be measured along with price elasticity and the return on investment that would accrue to Johnson & Johnson through having all three products — a nighttime sleep aid alone, a four-hour branded acetaminophen with codeine product, and an eight-hour analgesic combined with a sleep aid — in the market at the same time.

The information generated by phase II can be used for segmentation, targeting, and estimating the level of cannibalization of existing brands caused by introducing a new competitive therapeutic agent. If segmentation, targeting, and an estimation of cannibalization rates are attempted without knowledge

of the natural positioning (phase I) of Product X, the accuracy of the results of a discrete choice model survey will be highly questionable.

#### *Phase III: data mining and targeting*

Pharmaceutical companies have a long history of primary research with physicians, pharmacists, and nurses. These research efforts provide valuable insights into how professionals may be influenced to use or prescribe new products by providing an understanding of how they think, feel, and react to the diagnosis and treatment of medical problems such as post-surgical pain in pediatric patients. It does not, however, provide predictive models indicating the types of physicians who are most likely to initially try and to adopt new products. Data mining, on the other hand, uses the historical prescription data that manufacturers purchase from companies such as IMS and NDC in order to support the allocation of marketing resources through better segmentation and targeting of those physicians most likely to use new products.

Advanced predictive modeling techniques are used to understand the issues that a typical set of prescription spreadsheets cannot reveal. Pharmaceutical companies typically have Excel spreadsheets with thousands of individual physician records representing the moving annual total (MAT) prescriptions written for products such as analgesics used to treat pain and/or induce sleep. The main objective is to use that data to identify and profile the products that are the best targets from which to gain market share. A secondary objective is to identify holes in the market, i.e., those geographic or therapeutic segments where existing products have not achieved substantial penetration.

The process of data mining is a carefully planned search whose mission is to find valuables hidden from sight. . . as opposed to a haphazard statistical ramble in the dark. That search must be an informed one that is guided by the natural positioning of Product X (as determined during phase I) or it will miss the mark.

#### *Phase IV: final positioning/main messages testing*

By the time we get to phase IV, we

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**NP**  
**4P**

### The Axxiom HealthCare Alliance



have come full circle with a return to qualitative methodology (typically on the eve of launch). In this phase, we often utilize two qualitative methods:

1. Individual depth interviews to test the match between the product profile and the selected positioning statement; and test the match between the main positioning statement and supporting messages.

This testing can be done either through the use of advertising and promotional materials in a traditional message testing study or by using a master detail test video simulating how the positioning and supporting messages might be delivered to physicians. The video allows standardization of the message delivery much as showing a journal ad would. This research tells us how the position and supporting messages are likely to impact an individual physician's initiative to try Product X. Reasons for and against cannibalizing in-line products can also be identified.


2. Mini-focus groups in a marketing war games exercise. Typically, a group of 10 physicians representing the target

market are recruited. After an initial discussion of the therapeutic area and the current options available for the treatment of post-surgical pediatric pain, two groups of five physicians each are formed and seated in separate rooms. One group is instructed to examine the positioning and supportive messages for Product X and determine how best to convince the other group to undertake trial use and ultimately adopt the new product into their working drug armamentaria.

The second group is instructed to do the opposite, i.e., to take a competitor's stance using the positioning and supporting messages to develop a convincing argument against the use of Product X. Given 30-45 minutes to develop their arguments, the two groups re-convene, debate the issues and try to determine which group developed the stronger argument and why. This research tells us how strong the arguments for and against Product X are likely to be during the launch phase and also allows us to develop opposing arguments to negate the potential influ-

ence of negative or competitive statements (a.k.a. marketing war games).

### Conclusions

This article represents an effort to convey the importance of a rational and effective research method for creating successful marketing strategies for new drug product launches. Although the authors acknowledge that the NP/4P paradigm contains some components that have long been in use in health care marketing research, we also maintain that the use of these methods in a specific, clearly enumerated four-phase format can greatly relieve the eventual pain of a drug launch based on less compelling information. Companies that use the NP/4P paradigm to prepare for new drug launches will be rewarded by rapidly developing product awareness, early trial and adoption, and success in the marketplace. 

*Authors' note: For those readers who like a good mystery but haven't figured this one out yet, NP/4P stands for "natural positioning over four phases."*



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## Product & Service Update

continued from p. 12

perform tasks on live Web sites using a familiar browser interface. This is accompanied by a click-stream analysis tool that shows the paths taken by the users and whether or not the chosen paths resulted in the successful completion of tasks.

Results from the Modalis UXD system can be used over time to monitor and improve the experience of Web site visitors. Diagnostic output shows how well a site performs at creating satisfied and loyal customers and whether usability issues stand as barriers to these goals. The system can also be used to test competitive sites and make quantitative comparisons. For more information call Astrid Proboll at 415-430-2200 or visit [www.modalis.com](http://www.modalis.com).

## LGBT panel debuts

PlanetOut Partners, Inc. and Modalis Research Technologies, Inc., San Francisco, have announced the formation of a panel of lesbian, gay, bisexual and transgender (LGBT) people. Drawing on PlanetOut.com and Gay.com's more than 2.4 million registered users and 4.3 million unique visitors per month, the panel will provide representation of the estimated

\$450-billion LGBT market in the U.S.

The panel members will participate in ongoing Internet based product and service surveys, which will be available to manufacturers and service providers who wish to understand the LGBT markets better. In addition to the master panel, which will be used for general consumer and business research, specialized sub-panels will be created. These sub-panels will focus on various industry and lifestyle segments of the LGBT community.

In addition to specialized research for specific manufacturers and service providers, general studies on the interests and plans of panelists will be released as syndicated reports. These studies may include topics such as personal financial and investment plans, travel plans, preferred brands, and planned purchases in a number of product and service categories.

Participation in the panel is completely opt-in at the member's choice and the companies have ensured strict adherence to privacy and confidentiality standards. All members of the panel will have basic profiling information on file from which targeted samples can be drawn. Under no circumstances will individual responses or individual information be revealed; all data will be analyzed and reported in aggregate. All online research will be conducted under the code of ethics estab-

lished by the Interactive Marketing Research Organization (IMRO). For more information call Astrid Proboll at 415-430-2200 or visit [www.modalis.com](http://www.modalis.com) or [www.planetout.com](http://www.planetout.com).

## SPSS releases SamplePower 2.0

SPSS Inc., Chicago, is now shipping SamplePower 2.0, the latest version of its power analysis software. SamplePower enables researchers to strike a balance among significance level, effect size and sample size. Researchers can use SamplePower before collecting data to determine the sample size needed to have a reasonable chance of rejecting the null hypothesis. SamplePower includes flexible presentation tools such as plain-language text reports, presentation-quality tables and high-impact charts. New features in SamplePower 2.0 include:

- New types of power analysis - SamplePower now includes survival analysis, logistic regression and equivalence tests for more accurate research results.
- Interactive tables - Tables can be pivoted to provide different views of analytical results. Once a table is pivoted, any associated graphs are rebuilt automatically to reflect the new structure.
- Expanded exporting capabilities - Data can now be exported to Excel or other spreadsheet programs and charts can be saved in a variety of graphics formats for use in software such as Word or PowerPoint. For more information visit [www.spss.com/spower](http://www.spss.com/spower) or call 800-543-2185.

## Guide to researching public relations

The Institute for Public Relations is now offering a study on the measurement and evaluation of public relations, entitled "Research Doesn't Have to Put You in the Poorhouse." Written by Walter Lindenmann, former head of research at Ketchum in New York, the study outlines how to save money by using techniques such as quick-tab

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polls, piggyback questions, secondary analysis, Internet projects, and intercept interviews. The complete text of the study is available at [www.instituteforpr.com](http://www.instituteforpr.com).

## Cozint, NDC Health launch health care research tool

Cozint Interactive, Inc., an Andover, Mass., e-health marketing services company, and NDCHealth, a provider of health information services and electronic commerce solutions, have introduced inFACT, a real-time information tool for the health care industry that combines weekly/daily prescriber data with primary market research insight and analysis.

InFACT, an acronym for integrated fast analytical continuous tracking, provides information on prescriber behavior including the attitudes and perceptions that influenced the physician during the prescription writing process. Additionally, inFACT allows for continuous monitoring of the market vs. "wave" research methodologies. Through a strategic agreement between Cozint and NDC, inFACT integrates NDC's weekly/daily U.S. prescription databases and Cozint's Web-based physician surveys to monitor the market dynamics of new product launches, new formulations, and any other point in the product life cycle. For more information visit [www.cozint.com](http://www.cozint.com).

## Update of STATISTICA available

StatSoft, Inc. Tulsa, Okla., is offering STATISTICA 6, an update of the firm's data analysis and visualization software. STATISTICA 6 offers more new features and enhancements to the program than any other upgrade. In addition to a simplified user interface, increased possibilities for customization, and the options for Web-enablement, the latest release features built-in Visual Basic scripting allowing programmers to access every aspect of the program for their custom applications.

For more information visit [www.statsoft.com](http://www.statsoft.com) or call 918-749-1119.

## New research tool for financial services marketers

Stamford, Conn., research firm Rothstein-Tauber, Inc., is now offering financial services marketers access to marketing intelligence about financial intermediaries. Newly developed,

Influent gathers marketing intelligence designed to meet the needs of marketers of financial services and products interested in reaching financial intermediaries. It is available only by subscription.

Influent, a new division of Rothstein-Tauber, Inc., conducts a series of focus group sessions with financial professionals (financial planners, lawyers, accountants, bankers, insurance agents, stockbrokers) and the wealthy and emerging affluent clients they advise. These two-hour



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sessions are made available to subscribers via live Web cast and CD. The first discussion groups are scheduled for June 4th.

Influent is available by a subscription that covers five topic areas over a 10-month period. Each topic is offered twice each year with a total of 160 in-depth discussions available to each subscriber. Marketers can subscribe to the service by topic or by target market. For more information contact David Rothstein at 866-660-5005 or visit [www.influentweb.com](http://www.influentweb.com).

## System protects intellectual property on the Net

Long Beach, Calif.-based Neotrope Software has launched Neotrope Mprotect, which provides deterrence against casual copying of visual intellectual property on the Internet, and offers protection against unauthorized re-use of copyrighted photographs and artwork.

The Neotrope Mprotect (Media Protect) system works by using a Web server-side component to authorize those domain names on the Internet which have permission to load graphical image files, and creates aliases of the actual locations of the images themselves. When loaded onto the authorized Web site, only the alias location is loaded into the HTML, precluding linking to the content from unauthorized locations. Even if the alias URL is loaded into a browser window, the result is an error page notifying the visitor that the content is protected by copyright, since the image alias isn't being loaded from the authorized site.

Additionally, a browser client-side component uses JavaScript to deactivate the mouse-click function, and provides a pop-up dialog when a visitor attempts to mouse-click any image on the protected page. The pop-up box announces that the images on the site are protected by copyright, and unauthorized copying and/or reproduction is prohibited.

Neotrope also offers an optional ser-

vice called ReMark, which embeds two types of invisible "watermarks" into the image files. The watermark is an invisible fingerprint, containing copyright and owner information both in the file data itself as well as interlaced into the image content. This process is done prior to placing the files onto the Internet, and is a one-time process, it is not done dynamically by the Mprotect system. For more information visit [www.NeotropeSoftware.com](http://www.NeotropeSoftware.com).

## Centralize research purchasing with QuickLink

MindBranch, Inc., a North Adams, Mass., research and business information firm, has launched QuickLink, a Web-based tool designed for business and corporate intranet desktops that helps companies centralize purchasing of market research, track research expenditures, and allows users to share information about reports that they have purchased across their entire organizations. QuickLink is a free, co-branded Web interface customized for client companies, available through their corporate intranet, and includes information on more than 16,000 market-research products; information exclusive to the client such as targeted daily news feeds, analyst insights, customized newsletters; and online account histories. For more information visit [www.mindbranch.com](http://www.mindbranch.com).

## Observe Web site interactions remotely

Sunnyvale, Calif., research firm NetRaker Corporation has included a new application, NetRaker Experience Recording (NRER), in the new version of the NetRaker Web Site Research. NRER enables users to remotely observe and record customer interactions, and conduct real-time testing. NetRaker Experience Recording is now available with the NetRaker Web Site Research from NetRaker.

By using a screen-sharing technology integrated with the NetRaker Web

Site Research application, NRER enables users to observe customer interactions remotely — what customers saw, what they typed, where they clicked and where they got lost. In addition, NRER allows users to capture a customer's experience as they use the Web site or application by recording their actions and feedback in real-time, rather than giving an account of their experience after the fact. NRER can be used to test concepts, early designs, and complete Web sites and software applications. For more information call 877-483-2114 option 2 or visit [www.netraker.com](http://www.netraker.com).

## Megaputer ships PolyAnalyst 4.4 data mining system

Bloomington, Ind.-based Megaputer Intelligence Inc. has released PolyAnalyst 4.4, a data mining tool offering new features that simplify the integration of results obtained through PolyAnalyst data analysis in any external decision support applications and help the processing of very large databases in their entirety. The new PolyAnalyst Model Application Wizard allows simple scoring of data in any external source through a standard SQL-based protocol, OLE DB. PolyAnalyst can export created models in XML/PMML format or store these models in a new OLE DB for Data Mining format suitable for direct data scoring. Additionally, PolyAnalyst 4.4 provides In-Place Data Mining capability for working with very large data in dynamic SQL mode through an intuitive interface. A free evaluation copy of the system is available at [www.megaputer.com](http://www.megaputer.com).

## Database of consumer mindsets

Yankelovich, Norwalk, Conn., has introduced a new profiling tool designed to help marketers understand what motives consumer spending. MONITOR MindBase is a database of American consumers' mindsets. Through analysis and predictive mod-



eling, Yankelovich has identified eight major groups of Americans. The eight groups can be further broken down into 32 distinct segments that represent high-value targeting opportunities for marketers. Based on a multi-year study of American values, it reflects an analysis of how values drive the choices that consumers make in the marketplace. It reveals how the underlying perspectives or core values form the context within which consumers receive and interpret marketing messages. MONITOR MindBase can be appended to third-party lists and compiled databases to increase their predictive value. For more information visit <http://secure.yankelovich.com/solutions/mindbase.asp>.

## ArcView 8.1, MapObjects 2.1 from ESRI

ESRI, a Redlands, Calif.-based geographic information system software firm, has released ArcView 8.1, the firm's desktop GIS and mapping software. The product provides geograph-

ic data visualization, query, analysis, and integration capabilities along with the ability to create and edit geographic data. ArcView 8.1 includes a new architecture, providing an enhanced user experience, based on current standards in the information technology arena. ArcView 8.1 maintains the base functionality of ArcView GIS 3.x and adds improvements. New features include a catalog for browsing and managing data, on-the-fly coordinate and datum projection, metadata creation, customization with built-in Visual Basic for Applications, new geographic editing tools, support for static annotation, enhanced cartographic tools, and more. ArcView 8.1 is Internet enabled, allowing the integration of Internet map data with a user's local data.

The firm is also offering MapObjects 2.1, the newest version of its embeddable mapping and GIS components. MapObjects 2.1 offers new features including support for AutoCAD 2000 DWG files, ActiveX Data Objects (ADO), image catalogs, ArcSDE 8.1

support, the latest ESRI projection engine, data previously included in ESRI's ArcView StreetMap for geocoding, custom symbols for chart rendering, and a new run-time deployment utility for easier application distribution. MapObjects 2.1 also supports versioning for ESRI's ArcSDE layers; it can connect to any ArcSDE version and allow users to view it. Users can also identify and select versions based on version names. For more information visit [www.esri.com](http://www.esri.com).

## Free access to results of corporate executive survey

Patrick Marketing Group (PMG), a Calabasas, Calif.-based full-service marketing agency, has released the results of its latest online survey of U.S. corporate executives. The findings underscore directions in marketing and business development, revealing the plans and priorities of decision makers across the country. PMG sent the survey to executives in business-to-business sectors that are experiencing significant change in

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their markets. The 180 respondents provide a cross-sectional view of major trends and market conditions. The survey gathered data on topics in sales, marketing, and e-business, including: identification of the business issues driving change in the market; the major objectives of current e-business initiatives; major challenges impacting the success of the sales force; the trend toward direct versus broad-based marketing activities. The complete set of survey results is available free at [www.patrickmarketing.com/reports.htm](http://www.patrickmarketing.com/reports.htm).

## NPD tracks Harry Potter phenomenon

Marketing information provider The NPD Group, Inc., Port Washington, N.Y., has introduced The NPD Harry Potter Prophet, a series of seven reports that will provide insight on Harry Potter-related trends. The reports will capture information on attitudes and behavior among children and adults, revealing which Harry Potter products are most popular, who plans to purchase Harry Potter products in the future, and what potential lies ahead for these products before, during, and after the release of the Harry Potter movie. For more information contact Christina Charasse at 516-625-4889 or at [christina\\_charasse@npd.com](mailto:christina_charasse@npd.com) or visit [www.npd.com](http://www.npd.com).

## System looks at key business benchmarks

Stat Resources of Chestnut Hill, Mass., and InterTabs USA have partnered to create TRIPOD Metrics, a system designed to give companies an understanding of their customers, employees, and business performance. It uses pre-validated measures of customers, employees, and market dominance and gives benchmarks against other firms in the same or similar industries as well as similarly-sized companies in any industry. In addition, customers and employees are segmented based on loyalty. For more information visit [www.stat-resources.com](http://www.stat-resources.com).

## Briefly...

Accent on Research has opened a **new focus group facility** in Los Angeles, including audio-visual equipment, translation capabilities, and recruiting from the entire Los Angeles metro area. For more information call Susan Perl at 866-882-8351.

Sage Research, Inc., a Natick, Mass., research firm providing demand-side research to IT vendors and service providers, has launched its **redesigned Web site** at [www.sageresearch.com](http://www.sageresearch.com). The site provides information about how market research is conducted and used to develop marketing and sales strategies.

NPD HomeTrak, the home goods division of Port Washington, N.Y.-based The NPD Group, Inc., has launched two new services that will **track the sales of crystal giftware and dinnerware accessories** sold in department stores.

MapInfo Corporation, Troy, N.Y., plan **integrate Census 2000 data into its market analysis products**. MapInfo TargetPro v3.6 will be the first MapInfo solution to utilize the newly released data by incorporating a full set of estimates based on corrected state totals.

SPSS Data Entry 3.0, **survey design and data collection software** from SPSS Inc., Chicago, is now available for the Linux and Sun Solaris platforms. SPSS Data Entry 3.0 features a new architecture designed to deliver better Web performance, faster processing times and increased online security. For more information visit [www.spss.com/dataentry](http://www.spss.com/dataentry).

Chicago research software firm SPSS MR has introduced mrInterview, a **Web survey product**, as part of its Dimensions suite of products. Instead of writing html in the script, there are html templates where users dictate screen layout; instead of copying files over, there is an activation wizard that goes live based on user specifications. Routing, rotation and randomization,

can also be incorporated. For more information visit [www.spss.com](http://www.spss.com).

ACNielsen U.S., Schaumburg, Ill., has **expanded its Homescan Hispanic panel** from 725 to 1,500 households. The panel consists of a representative number of Los Angeles Hispanic households in which English is the preferred language, those that are bilingual and those in which Spanish is the language of choice, enabling the Los Angeles Hispanic community to be segmented by language preference. Using in-home scanners, panelists record all UPC-coded products that they purchase.

New York-based Light Reading, an **information resource for the optical networking industry**, has launched a new Web site, [www.lightreading/research](http://www.lightreading/research), covering market research on industry trends and developments.

Total Research Corp., Princeton, N.J., has developed Customer Profitability Management, an **analytic approach that links customer loyalty and customer profitability** to show the cost of retaining and growing a company's most profitable companies.

Lexington, Ky., research firm The Matrix Group has opened a **new meeting and conference center** along with expanded capabilities for focus groups and other qualitative research. For more information call Martha DeReamer at 859-263-8177.

Las Vegas-based MRCGroup Research Institute has opened its new **Executive Video Conference Center**, which provides multi-site video meetings via Worldwide Sprint or MRCGroup's own Internet streaming media. For more information call Jim Medick at 702-360-7700.

Decision Analyst, Arlington, Texas, has created a new Web site, [www.secondarydata.com](http://www.secondarydata.com), which includes **links to a variety of free economic data and marketing research sites**.



# Moderator MarketPlace™

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

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Erich Transcultural Consultants  
Fader & Associates  
First Market Research Corp. (MA)  
Global Qualitative Group, LLC  
Millennium Research, Inc.  
Outsmart Marketing  
Planet Latino Market Intelligence  
The Research Department  
Jay L. Roth Associates, Inc.  
Paul Schneller Qualitative LLC  
Strategy Research Corporation

### AFRICAN-AMERICAN

Access Worldwide, Cultural  
Access Group  
Erich Transcultural Consultants

### AGRICULTURE

Cambridge Associates, Ltd.  
Cambridge Research, Inc.  
FOCUSED Marketing Research, Inc.  
Millennium Research, Inc.

### ALCOHOLIC BEV.

C&R Research Services, Inc.  
James Spanier Research  
Strategy Research Corporation

### ARTS & CULTURE

Strategic Focus, Inc.

### ASIAN

Access Worldwide, Cultural  
Access Group  
Cheskin  
Data & Management Counsel, Inc.  
Erich Transcultural Consultants

### ASSOCIATIONS

Low + Associates, Inc.

### AUTOMOTIVE

AutoPacific, Inc.  
C&R Research Services, Inc.  
Erich Transcultural Consultants  
MarketResponse International  
Matrixx Marketing-Research Div.

### BIO-TECH

MedProbe, Inc.

### BUILDING PRODUCTS

Market Resource Associates

### BUS.-TO-BUS.

Access Research, Inc.  
BAIGlobal Inc.  
Behavior Research Center, Inc.  
C&R Research Services, Inc.  
Calo Research Services  
Cambridge Associates, Ltd.  
Cambridge Research, Inc.  
Creative Focus, Inc.  
Data & Management Counsel, Inc.  
Fader & Associates  
First Market Research Corp. (TX)  
FOCUSED Marketing Research, Inc.  
Just The Facts, Inc.  
Knowledge Systems & Research, Inc.  
Market Resource Associates  
MarketResponse International  
MCC Qualitative Consulting  
Millennium Research, Inc.  
NOP Business Strategic Research  
The Pat Henry Group  
The Research Department  
Jay L. Roth Associates, Inc.  
Paul Schneller Qualitative LLC

### CABLE

C&R Research Services, Inc.

### CHILDREN

C&R Research Services, Inc.  
Fader & Associates  
Just The Facts, Inc.  
Outsmart Marketing  
Thorne Creative Research

### COMMUNICATIONS RESEARCH

Access Research, Inc.  
Cambridge Associates, Ltd.  
Creative Focus, Inc.  
MarketResponse International  
NOP Business Strategic Research  
Jay L. Roth Associates, Inc.

### COMPUTERS/HARDWARE

Global Qualitative Group, LLC  
NOP Business Strategic Research

### COMPUTERS/MIS

C&R Research Services, Inc.  
Calo Research Services  
Cambridge Associates, Ltd.  
Daniel Associates  
Fader & Associates  
First Market Research Corp. (TX)  
Marketing Advantage Rsch. Cnslts.  
NOP Business Strategic Research

### CONSUMERS

Behavior Research Center, Inc.  
C&R Research Services, Inc.  
Cheskin  
Decision Drivers

Fader & Associates  
Just The Facts, Inc.  
Knowledge Systems & Research, Inc.  
Market Resource Associates  
Marketing Advantage Rsch. Cnslts.  
The Pat Henry Group  
Planet Latino Market Intelligence  
The Research Department  
Jay L. Roth Associates, Inc.

### CUSTOMER SATISFACTION

BAIGlobal Inc.  
Global Qualitative Group, LLC  
Low + Associates, Inc.  
Market Resource Associates

### DIRECT MARKETING

BAIGlobal Inc.  
Strategic Focus, Inc.

### DISTRIBUTION

Burr Research/Reinvention  
Prevention

### EDUCATION

Cambridge Associates, Ltd.  
Just The Facts, Inc.  
Marketing Advantage Rsch. Cnslts.

### ELECTRONICS - CONSUMER

MarketResponse International

### EMPLOYEE

Turnstone Research, Inc.

### ETHNIC

Cheskin

### ETHNOGRAPHIC RESEARCH

ActiveFOCUS  
Alexander + Parker  
Cheskin

### EXECUTIVES

BAIGlobal Inc.  
C&R Research Services, Inc.  
Calo Research Services  
Decision Drivers  
Fader & Associates  
First Market Research Corp. (TX)  
Low + Associates, Inc.  
Marketing Advantage Rsch. Cnslts.  
The Research Department  
Jay L. Roth Associates, Inc.  
Paul Schneller Qualitative LLC  
Strategy Research Corporation

### FINANCIAL SERVICES

Jeff Anderson Consulting, Inc.  
BAIGlobal Inc.  
Burr Research/Reinvention  
Prevention  
C&R Research Services, Inc.  
Cambridge Associates, Ltd.  
Cambridge Research, Inc.  
Fader & Associates  
FOCUSED Marketing Research, Inc.  
Low + Associates, Inc.  
Marketing Matrix International, Inc.  
MCC Qualitative Consulting  
Jay L. Roth Associates, Inc.  
The Research Department

### FOOD PRODUCTS/ NUTRITION

ActiveFOCUS  
BAIGlobal Inc.  
C&R Research Services, Inc.  
Just The Facts, Inc.  
Outsmart Marketing  
The Research Department  
Jay L. Roth Associates, Inc.  
Paul Schneller Qualitative LLC

### FOREST PRODUCTS

Market Resource Associates

### GENERATION X

Thorne Creative Research

### HEALTH & BEAUTY PRODUCTS

BAIGlobal Inc.  
Paul Schneller Qualitative LLC

### HEALTH CARE

Jeff Anderson Consulting, Inc.  
Balaban Market Research Consulting  
Chalfont Healthcare Research, Inc.  
Erich Transcultural Consultants  
Fader & Associates  
First Market Research Corp. (MA)  
I+G Medical Research International  
Knowledge Systems & Research, Inc.  
Low + Associates, Inc.  
Market Access Partners  
MarketBetter, Inc.  
MarketResponse International  
Medical Moderators, Inc.  
MedProbe™ Inc.  
Strategy Research Corporation

### HIGH-TECH

Jeff Anderson Consulting, Inc.  
Calo Research Services  
Cheskin  
Ergo Research Group, Inc.  
Global Qualitative Group, LLC  
MarketBetter, Inc.  
Research Connections @ Talk City



# Moderator MarketPlace™

NOP Business Strategic Research  
Primary Insights, Inc.  
Jay L. Roth Associates, Inc.  
James Spanier Research

## HISPANIC

Access Worldwide, Cultural  
Access Group  
Behavior Research Center, Inc.  
Cheskin  
Data & Management Counsel, Inc.  
Erich Transcultural Consultants  
Hispanic Research Inc.  
Planet Latino Market Intelligence  
Loretta Marketing Group  
Strategy Research Corporation  
Target Market Research Group, Inc.

## HOUSEHOLD

### PRODUCTS/CHORES

The Research Department  
Paul Schneller Qualitative LLC

### HUMAN RESOURCES ORGANIZATIONAL DEV.

Primary Insights, Inc.

## IDEA GENERATION

BAIGlobal Inc.  
C&R Research Services, Inc.  
Creative Focus, Inc.  
Global Qualitative Group, LLC  
Just The Facts, Inc.  
Matrixx Marketing-Research Div.  
Primary Insights, Inc.  
Thorne Creative Research

## IMAGE STUDIES

Cambridge Associates, Ltd.  
MarketResponse International

## INDUSTRIAL

First Market Research Corp. (TX)

## INSURANCE

Burr Research/Reinvention  
Prevention  
Erich Transcultural Consultants  
Low + Associates, Inc.

### INTERACTIVE PROD./ SERVICES/RETAILING

Ergo Research Group, Inc.  
Low + Associates, Inc.  
Research Connections @ Talk City

## INTERNATIONAL

Fader & Associates  
Primary Insights, Inc.

## INTERNET

Calo Research Services  
Cheskin  
Ergo Research Group, Inc.  
Fader & Associates  
First Market Research Corp. (MA)  
FOCUSED Marketing Research, Inc.

Global Qualitative Group, LLC  
Knowledge Systems & Research, Inc.  
Low + Associates, Inc.  
Research Connections @ Talk City  
Jay L. Roth Associates, Inc.

### INTERNET SITE CONTENT & DESIGN

FOCUSED Marketing Research, Inc.

## LATIN AMERICA

Access Worldwide, Cultural  
Access Group  
Best Practices Research  
Cheskin  
Loretta Marketing Group  
Planet Latino Market Intelligence  
Strategy Research Corporation

## MEDICAL PROFESSION

Balaban Market Research Consulting  
Cambridge Associates, Ltd.  
Chalfont Healthcare Research, Inc.  
I+G Medical Research International  
Matrixx Marketing-Research Div.  
Medical Moderators, Inc.  
MedProbe™ Inc.  
The Pat Henry Group  
Paul Schneller Qualitative LLC

## MULTIMEDIA

Marketing Advantage Rsch. Cnslts.

## NEW PRODUCT DEV.

ActiveFOCUS  
BAIGlobal Inc.  
C&R Research Services, Inc.  
Cambridge Associates, Ltd.  
Data & Management Counsel, Inc.  
Fader & Associates  
First Market Research Corp. (TX)  
Global Qualitative Group, LLC  
Just The Facts, Inc.  
Market Resource Associates  
Marketing Advantage Rsch. Cnslts.  
Millennium Research, Inc.  
Outsmart Marketing  
Primary Insights, Inc.  
The Research Department  
Jay L. Roth Associates, Inc.  
Paul Schneller Qualitative LLC

## ONLINE FOCUS GROUPS

Research Connections @ Talk City

## PACKAGED GOODS

ActiveFOCUS  
BAIGlobal Inc.  
C&R Research Services, Inc.  
Just The Facts, Inc.  
Jay L. Roth Associates, Inc.

### PACKAGE DESIGN RESEARCH

Cheskin  
The Research Department

## PARENTS

Fader & Associates

## PET PRODUCTS

Cambridge Research, Inc.  
FOCUSED Marketing Research, Inc.  
MarketResponse International  
Primary Insights, Inc.

## PHARMACEUTICALS

ActiveFOCUS  
BAIGlobal Inc.  
Balaban Market Research Consulting  
C&R Research Services, Inc.  
Cambridge Associates, Ltd.  
Chalfont Healthcare Research, Inc.  
Fader & Associates  
I+G Medical Research International  
MarketResponse International  
MCC Qualitative Consulting  
Medical Moderators, Inc.  
MedProbe™ Inc.  
Paul Schneller Qualitative LLC

### POLITICAL/SOCIAL RESEARCH

Cambridge Associates, Ltd.

## POSITIONING RESEARCH

Paul Schneller Qualitative LLC

## PUBLIC POLICY RSCH.

Cambridge Associates, Ltd.

## PUBLISHING

Cambridge Associates, Ltd.  
First Market Research Corp. (TX)  
Marketing Advantage Rsch. Cnslts.  
James Spanier Research

## RETAIL

First Market Research Corp. (MA)  
Knowledge Systems & Research, Inc.  
MCC Qualitative Consulting  
The Pat Henry Group

## SENIORS

Burr Research/Reinvention  
Prevention  
Primary Insights, Inc.

### SMALL BUSINESS/ ENTREPRENEURS

FOCUSED Marketing Research, Inc.  
Strategy Research Corporation

## SOFT DRINKS, BEER, WINE

C&R Research Services, Inc.  
Cambridge Associates, Ltd.  
Jay L. Roth Associates, Inc.  
Strategy Research Corporation

## SPORTS

FOCUSED Marketing Research, Inc.  
MarketBetter, Inc.

## STRATEGY DEVELOPMENT

Paul Schneller Qualitative LLC

## TEENAGERS

C&R Research Services, Inc.  
Fader & Associates  
MCC Qualitative Consulting  
Planet Latino Market Intelligence  
Thorne Creative Research

## TELECOMMUNICATIONS

BAIGlobal Inc.  
Calo Research Services  
Creative Focus, Inc.  
Daniel Associates  
Ergo Research Group, Inc.  
Erich Transcultural Consultants  
First Market Research Corp. (TX)  
Global Qualitative Group, LLC  
Knowledge Systems & Research, Inc.  
Marketing Advantage Rsch. Cnslts.  
MarketResponse International  
MCC Qualitative Consulting  
NOP Business Strategic Research  
The Research Department  
Jay L. Roth Associates, Inc.  
Strategy Research Corporation

## TELECONFERENCING

Cambridge Research, Inc.

### TELEPHONE FOCUS GROUPS

C&R Research Services, Inc.  
Cambridge Associates, Ltd.  
MedProbe, Inc.  
Millennium Research, Inc.

## TOYS/GAMES

Fader & Associates

## TRANSPORTATION SVCS

Low + Associates, Inc.  
Strategic Focus, Inc.

## TRAVEL

Cambridge Associates, Ltd.  
James Spanier Research

## UTILITIES

Cambridge Associates, Ltd.  
Knowledge Systems & Research, Inc.  
Turnstone Research, Inc.

## VETERINARY MEDICINE

FOCUSED Marketing Research, Inc.  
Paul Schneller Qualitative LLC

## WEALTHY

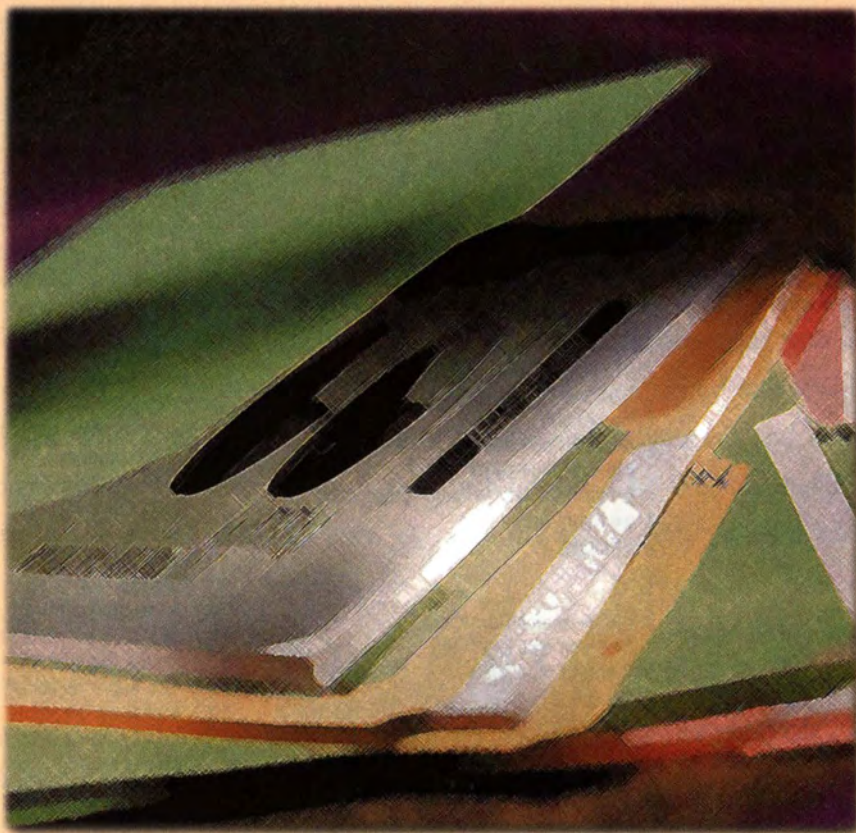
Strategy Research Corporation

## YOUTH

MarketResponse International



# 2001 Omnibus **Research** Directory



This directory was developed by mailing forms to firms we identified as providers of omnibus studies. In addition to each company's vital information, we've included the names of the omnibus studies, the sample size ( $n =$ ) and the frequency of the studies. As an added feature, firms have been cross-indexed by the markets their omnibus studies serve. The studies listed in this directory meet the following definition: An omnibus study is one in which the sponsoring research company defines the audience to be surveyed and the intervals between studies. Clients participate by submitting proprietary questions. Clients receive results only from their proprietary questions and general demographic questions.



ABACUS S.p.A.  
Via Villorosi 13  
20143 Milan  
Italy  
Ph. 39-02-58-16-51  
Fax 39-02-58-10-40-69  
E-mail: info.mi@abacus.tnsofres.it  
Nando Pagnoncelli

**Studies:**  
ABACUS Telephone Omnibus

ACNielsen - DJC Research  
2300 Yonge St., Ste. 2100  
Toronto, ON M4P 1E4  
Canada  
Ph. 416-487-0886  
Fax 416-487-5203  
E-mail: solutions@djcresearch.com  
www.acnielsen.ca

**Studies:**  
Grocery Shopper Omnibus  
Chinese Omnibus - Toronto/Vancouver

ACNielsen Omnibus  
ACNielsen Centre  
11 Talavera Road  
Macquarie Park, NSW 2113  
Australia  
Ph. 61-2-8873-7813  
Fax 61-2-8873-7001  
E-mail: omni@acnielsen.com.au  
www.acnielsen.com.au

**Studies:**  
Face-to-Face Omnibus  
n = 1,000 - frequency: 47/yr.  
Telephone Omnibus  
n = 2,050 - frequency: 26/yr.

Ad Hoc Research  
1250 Guy, 9th floor  
Montreal, PQ H3H 2T4  
Canada  
Ph. 514-937-4040  
Fax 514-935-7700  
E-mail: info@adhoc-recherche.com  
www.adhoc-research.com  
Richard Saint-Pierre

**Studies:**  
Omnibus Quebec Population  
n = 500 - frequency: 4/yr.

Advanis Field Research (AFR)  
10123 99 Street, Ste. 1600  
Edmonton, AB T5J 3H1  
Canada  
Ph. 780-944-9212  
Fax 780-426-7622  
E-mail: info@advanisfield.ca  
www.advanisfield.ca

**Studies:**  
OmniJeep  
n = 550 - frequency: 12/yr.

AISA Slovakia Ltd.  
Drotarska cesta 46  
81718 Bratislava  
Slovakia  
Ph. 421-7-62-80-18-23  
Fax 421-7-62-80-21-70  
E-mail: aisa@aisa.sk  
www.aisa.sk  
Jan Hudak

**Studies:**  
AISA  
n = 750 - frequency: /yr.

Aleph Zero Market Research  
Caseros 2284, Olivos  
1636 Buenos Aires  
Argentina  
Ph. 54-11-4791-4947  
Fax 54-11-4791-4930  
E-mail: lorej@alephzero.com.ar  
www.alephresearch.com.ar

**Studies:**  
Omnibus Net. Argentina  
n = 1,000 - frequency: 12/yr.  
Omnibus Net. Brazil  
n = 1,000 - frequency: 12/yr.  
Omnibus Net. Mexico  
n = 1,000 - frequency: 12/yr.  
Omnibus Net. Chile  
n = 1,000 - frequency: 6/yr.  
Omnibus Net. Uruguay  
n = 1,000 - frequency: 4/yr.

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

**Studies:**  
The Environmental Report  
The Power of Children

AMI International  
9/F Leighton Centre  
77 Leighton Road  
Causeway Bay  
Hong Kong  
Ph. 852-2881-5388  
Fax 852-2881-5918  
E-mail: international@ami-group.com  
www.ami-group.com

**Studies:**  
AsiaBus

ARC Research Corporation  
14 Commerce Dr.  
Cranford, NJ 07016  
Ph. 908-276-6300  
Fax 908-276-1301  
E-mail: dbelt@arcresearch.com  
www.arcresearch.com

**Studies:**  
Healthcare Purchase Process Among Consumers  
Impact of Color in Yellow Page Ads  
Business Communication Study  
Yellow Pages in the Lawn & Garden Purchase Process  
Yellow Page Font Size Study  
Impact of White Knockout in the Yellow Pages  
Yellow Pages in the Automotive Aftermarket  
Yellow Pages in the Moving & Storage Industry

Baltic Data House  
5/7 Akas Street  
Riga 1011  
Latvia  
Ph. 371-7096300  
Fax 371-7096314  
E-mail: bdh@bdh.lv  
www.bdh.lv  
Karina Kolesnikova

**Studies:**  
Baltic Omnibus  
n = 3,000 - frequency: 12/yr.  
Baltic Telebus  
n = 1,500 - frequency: 50/yr.  
Business Omnibus  
n = 1,200 - frequency: 2/yr.

Berent Aps  
Njalsgade 21G, 5  
2300 Copenhagen S  
Denmark  
Ph. 45-32-64-12-00  
Fax 45-32-64-12-09  
E-mail: info@berent.dk  
www.berent.dk

**Studies:**  
Berent Omnibus Denmark  
n = 500 - frequency: 52/yr.  
Berent Omnibus Norway  
n = 500 - frequency: 52/yr.  
Berent Omnibus Sweden  
n = 500 - frequency: 52/yr.  
Berent Omnibus Finland  
n = 500 - frequency: 52/yr.

Beta Research Corp.  
6400 Jericho Tpke.  
Syosset, NY 11791  
Ph. 516-935-3800  
Fax 516-935-4092  
E-mail: virginia@nybeta.com  
www.nybeta.com  
Manny Mallo, President

**Studies:**  
Omni-Health

BMRB International Ltd  
Hadley House  
79-81 Uxbridge Road  
Ealing, London W5 5SU  
United Kingdom  
Ph. 44-20-8566-5000  
Fax 44-20-8579-9208  
E-mail: access.omnibus@bmr.co.uk  
www.bmr.co.uk

**Studies:**  
Access to Youth  
n = 1,000 - frequency: 12/yr.  
Access to Internet  
n = 500 - frequency: 52/yr.  
Access by Telephone  
n = 1,000 - 2,000 - frequency: 52/yr.  
Access Face-to-Face  
n = 2,000 - frequency: 52/yr.



# It All Connects Here



Every day **CENTRIS**<sup>SM</sup> connects with a national random sample of households (1,000 each week) reporting on their PCs, DVDs, CD-ROMs, CDs, Internet access, pagers and cell phones, video tapes and games, cable, satellite dishes, PPV and over 50 other communication, entertainment and technology areas. Using this targeted omnibus service you can connect too—for as little as \$450 per question including geo-demographic cross-tabs and delivery within seven business days. Plus, you can begin and end your questions any day you want, ask them of anyone you want and tabulate the data any way you want.



Since we've been connecting with households for over two years, we've built a database with about 100 pieces of behavioral, geographic and demographic data for each of those 100,000+ households. You can slice and dice this **CENTRIS**<sup>SM</sup> data any way you want, creating customized reports and multi-dimensional insights into household connection patterns—for very little money, very quickly and very accurately.

To connect further, contact us:

**Call Toll-Free: 1.877.723.6874,**

or visit [www.centris.com](http://www.centris.com)

Email: [CENTRISJK@aol.com](mailto:CENTRISJK@aol.com)



BRC Field & Focus Services  
 1101 N. First St.  
 P.O. Box 13178  
 Phoenix, AZ 85002-3178  
 Ph. 602-258-4554  
 Fax 602-252-2729  
 E-mail: info@brc-research.com  
 www.brc-research.com/field  
 Earl de Berge, Research Director

**Studies:**

- BusinessTRACK  
 n = 400 - frequency: 2/yr.
- ConsumerTRACK  
 n = 700 - frequency: 4/yr.
- HispanicTRACK  
 n = 500 - frequency: 2/yr.
- MetroTRACK  
 n = 600 - frequency: 4/yr.

Irwin Broh & Associates  
 1011 E. Touhy Ave., Ste. 450  
 Des Plaines, IL 60018  
 Ph. 847-297-7515  
 Fax 847-297-7847  
 E-mail: dwaitz@irwinbroh.com  
 www.irwinbroh.com  
 Dave Waitz, President

**Studies:**

- Marcom  
 n = 5,000 - 40,000 - frequency: 3/yr.

Bruskin Research  
 100 Metroplex Dr.  
 Edison, NJ 08817  
 Ph. 732-572-7300  
 Fax 732-572-7980  
 E-mail: ikorman@bruskin.com

**Studies:**

- OmniTel  
 n = 1,000 - frequency: 52/yr.

Bruzzone Research Co.  
 2515 Santa Clara Ave., Ste. 104  
 Alameda, CA 94501  
 Ph. 510-523-5505  
 Fax 510-523-5507  
 E-mail: paulshellenberg@bruzzone-research.com  
 www.bruzzone-research.com  
 R. Paul Shellenberg, Dir. of Sales

**Studies:**

- Super Bowl Advertising

California Retail Survey  
 5121 Garfield Ave., #20  
 Sacramento, CA 95841  
 Ph. 916-331-3104  
 Fax 916-339-1438  
 E-mail: californiaretailsurvey@hotmail.com  
 www.californiaretailsurvey.netfirms.com  
 James Vaughn, President

**Studies:**

- California Retail Survey, 2000 Edition



**CARAVAN®**

P.O. Box 183  
 Princeton, NJ 08542  
 Ph. 800-999-0213  
 Fax 800-759-5786  
 E-mail: caravan@prn.opinionresearch.com  
 www.orcinternational.com  
 Judi Lescher, Sr. Vice President

**Studies:**

- CARAVAN®  
 n = 1,000/2,000 - frequency: 104/yr.
- TEEN CARAVAN®  
 n = 250/500 - frequency: on-call.
- PRE-TEEN CARAVAN®  
 n = 250/500 - frequency: on-call

CARAVAN® - a twice-weekly telephone omnibus survey conducted among a national probability sample of 1,000 adults (2,000 per week). CARAVAN® offers fast turnaround, low cost consumer insight. The longest running omnibus in the marketplace, CARAVAN® is the ideal research vehicle for collecting valuable information on topics ranging from image measurement and advertising tracking to product awareness and concept testing. CARAVAN® also offers TEEN CARAVAN® and PRE-TEEN CARAVAN®. Visit our Web site www.orcinternational.com for more information, or call 800-999-0213.  
 (See advertisement on p. 91)

Central Research Services, Inc. (CRS)  
 7-1-1 Nishi-Gotanda  
 Shinagawa-ku  
 Tokyo 141-0031  
 Japan  
 Ph. 81-3-5487-2311  
 Fax 81-3-5487-2316  
 E-mail: office@crs.or.jp  
 www.crs.or.jp  
 Muneharu Yotsui

**Studies:**

- CRS Monthly Omnibus Survey  
 n = 1,400 - frequency: 12/yr.



**CENTRIS™**

Santa Monica Studios  
 1817 Stanford  
 Santa Monica, CA 90404  
 Ph. 877-723-6874 (Toll-Free) or 310-264-8777  
 Fax 310-264-8776  
 E-mail: jkessel@centris.com  
 www.centris.com  
 Jerilyn Kessel, Director

**Studies:**

- CENTRIS™ Telephone Omnibus  
 n = 1,000 - frequency: 52/yr.

CENTRIS™ is a daily targeted national telephone omnibus survey tracking over 60 communications, entertainment and technology areas in more than 1,000 random households weekly. Customized crosstabs available in seven business days or less. Accumulated database of 200,000+ households available for data extracts, custom incidence or analytical reports, or follow-up studies.  
 (See advertisement on p. 89)

CF Group Inc.  
 An NFO Worldwide Company  
 1075 Bay St.  
 Toronto, ON M5S 2X5  
 Canada  
 Ph. 416-924-5751  
 Fax 416-923-7085  
 E-mail: cf@cfgroup.ca  
 www.cfgroup.ca  
 Laura Manzer

**Studies:**

- Monitor  
 n = 2,000 - frequency: 12/yr.
- Multifacts  
 n = 1,000 - frequency: 52/yr.
- Multi-Q  
 n = 22,000 - frequency: 4/yr.

CID/Gallup, S.A.  
 P.O. Box 5413  
 San Jose  
 Costa Rica  
 Ph. 506-220-4101  
 Fax 506-231-2145  
 E-mail: cid@cidgallup.com  
 www.cidgallup.com

**Studies:**

- CID Gallup Omnibus  
 frequency: 4/yr.

Custom Research Inc.  
 8401 Golden Valley Rd.  
 P.O. Box 27900  
 Minneapolis, MN 55427-0900  
 Ph. 763-542-0800  
 Fax 763-542-0864  
 E-mail: custom@customresearch.com  
 www.customresearch.com

**Studies:**

- Criterion® Omnibus Concept Testing Systems  
 Online/Internet Omnibus



Datum Internacional SA  
Luis F. Villaran, 365 San Isidro  
Lima 27  
Peru  
Ph. 51-1-221-4355  
Fax 51-1-221-5147  
E-mail: datum@terra.com.pe  
www.datum.com.pe

**Studies:**

Omnibus Datum

Decima Research, Inc.  
2 Bloor St. W., Ste. 2500  
Toronto, ON M4W 3E2  
Canada  
Ph. 416-962-2013  
Fax 416-962-0505  
E-mail: info@decima.ca  
www.decima.ca  
Robert Murphy, Vice President

**Studies:**

Decima Express Omnibus  
n = 1,000 - 2,000 - frequency: 12/yr.

DEMOSKOP  
Migdalowa Ste. 4  
02 796 Warsaw  
Poland  
Ph. 48-22-645-15-75 or 48-22-645-15-85  
Fax 48-22-645-15-74  
E-mail: demoskop@demoskop.com.pl  
www.demoskop.com.pl

**Studies:**

Demoskop Omnibus  
n = 1,000 - frequency: 12/yr.  
TargetBus  
n = 1,300 - frequency: 12/yr.

Digital Marketing Services  
1305 S. State Hwy. 121  
Lewisville, TX 75067  
Ph. 972-874-5080  
E-mail: dmsemial@aol.com  
www.dmsdallas.com

**Studies:**

Opinion Place Adult Omnibus  
n = 1,000 - frequency: 36/yr.

Direct Marketing Services Group, Inc.  
413 Northeast Third St.  
Delray Beach, FL 33483  
Ph. 800-229-4921  
Fax 800-599-5688  
E-mail: dmsg@silgroup.net  
www.silgroup.net  
Arnold Sheer

**Studies:**

Low Incidence Screener  
n = 15,000 - frequency: 4/yr.  
Hispanic Latino Omnibus  
n = 1,000 - frequency: 26/yr.

Dittman Research Corp. of Alaska  
DRC Building  
8115 Jewel Lake  
Anchorage, AK 99502  
Ph. 907-243-3345  
Fax 907-243-7172  
E-mail: dittman@alaska.net  
Terry O'Leary, Vice President

**Studies:**

Multi-Quest®

ENVIRONICS Research Group Ltd.  
33 Bloor St. E., Ste. 900  
Toronto, ON M4W 3H1  
Canada  
Ph. 416-920-9010  
Fax 416-920-3299  
E-mail: barry\_watson@environics.ca  
www.environics.ca  
Barry Watson, Managing Director

**Studies:**

Focus Canada  
Focus Ontario  
Environmental Monitor  
3SC Social Value Monitor  
Youth Research Div. Report

Epic/MRA  
4710 W. Saginaw, #5  
Lansing, MI 48917  
Ph. 517-886-0860  
Fax 517-886-9176  
E-mail: epicmra@prodigy.net  
**Studies:**  
Epic/MRA National Omnibus Survey

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contact Judi Lescher at:  
ph: 800-999-0213  
fax: 800-759-5786

e-mail: [caravan@prn.opinionresearch.com](mailto:caravan@prn.opinionresearch.com)

**ORC** INTERNATIONAL<sup>®</sup>



Equifax Direct Marketing Solutions, Inc.  
1621 18th St., Ste. 300  
Denver, CO 80202  
Ph. 303-292-5000 ext. 5277  
Fax 303-298-5633  
E-mail: david.triggs@equifax.com  
Dave Triggs

**Studies:**

Consumer Electronics Monitor - Consumer  
n = 750 - frequency: 2/yr.  
Consumer Electronics Monitor - Dealer  
n = 350 - frequency: 2/yr.  
Scout® Consumer Behavior Rsch. Program  
Stage 1: Product Purchaser Screening  
n = 200,000 - frequency: 4/yr.  
Stage 2: Product Purchaser Follow-up  
n = 25,000 - frequency: 4/yr.

Forum Canada Research, Inc.  
180 Bloor St. W., Ste. 1401  
Toronto, ON M5S 2V6  
Canada  
Ph. 416-960-9600 ext. 9603  
Fax 416-960-9602  
E-mail: lbozinoff@forumresearch.com  
www.forumresearch.com  
Lorne Bozinoff, President

**Studies:**

National Consumer Omnibus  
n = 1,000 - frequency: 52/yr.

Gaither International, Inc.  
G.P.O. Box 70211  
San Juan, PR 00936  
Ph. 787-728-5757  
Fax 787-728-5715  
E-mail: gaither@gaiterinternational.com  
www.gaiterinternational.com  
David Whitehouse, V.P. of Custom Rsch.

**Studies:**

Purchasing Agent Omnibus  
n = 1,000 - frequency: 4/yr.  
Representative Adult Omnibus  
n = 1,000 - frequency: 4/yr.

GfK Croatia  
Draskoviceva 54  
10 000 Zagreb  
Croatia  
Ph. 385-1-492-1222  
Fax 385-1-492-1223  
E-mail: gfk@gfk.hr  
www.gfk.hr

**Studies:**

GfK Croatia  
n = 1,000 - frequency: 10/yr.

GfK Marktforschung GmbH  
GfK Group  
Nordwestring 101  
90319 Nurnberg  
Germany  
Ph. 49-911-395-0  
Fax 49-911-395-4029  
E-mail: marktforschung@gfk.de  
www.gfk.de

**Studies:**

GfK Omnibus

GfK Sofema International  
10 rue Lionel Terray  
92508 Rueil Malmaison  
France  
Ph. 33-1-47-14-44-00  
Fax 33-1-47-14-44-99  
E-mail: marie-franceriggi@gfk.fr  
www.gfk.com

Dominique Hannover

**Studies:**

GLOBALBUS

Global Market Research  
Ludgate House  
245 Black Friars Rd.  
London SE1 9UL  
United Kingdom  
Ph. 44-20-7890-9363  
Fax 44-20-7890-9352  
E-mail: b.baker@nopres.co.uk  
www.agmr.com

**Studies:**

Sweden Telephone Index  
n = 1,000 - frequency: 52/yr.  
Sweden Face-to-Face Index  
n = 500 - frequency: 26/yr.  
Quantum Omnibus Belgium  
n = 1,000 - frequency: 52/yr.  
Scanner Omnibus Belgium  
n = 500 - frequency: 52/yr.  
Young Generation UK  
n = 1,000 - frequency: 12/yr.  
Random Location UK  
n = 2,000 - frequency: 42/yr.  
Telebus UK  
n = 1,000 - frequency: 100/yr.  
CATIBus Studies Greece  
n = 2,000 - frequency: 12/yr.  
I+R Omnibus Croatia  
n = 1,000 - frequency: 7/yr.  
Omnibus Saudi Arabia  
n = 200 - frequency: 26/yr.  
National Urban Omnibus Turkey  
n = 1,200 - frequency: 12/yr.

Greenfield Online  
21 River Rd., 2nd fl.  
Wilton, CT 06897  
Ph. 203-834-8585  
Fax 203-834-8686  
E-mail: info@greenfield.com  
www.greenfield.com  
Keith Price, Vice President

**Studies:**

Greenfield Online Omnibus Study  
n = 1,500 - frequency: 48/yr.  
PeoplePulse



**Harris Interactive**

Corporate Headquarters  
135 Corporate Woods  
Rochester, NY 14623  
Ph. 877-919-4765  
E-mail: info@harrisinteractive.com  
www.harrisinteractive.com/QQ

**Studies:**

Harris Interactive QuickQuery<sup>SM</sup>  
n = 2,000 - frequency: 100+/yr.

QuickQuery<sup>SM</sup>, a service of Harris Interactive, the global online market research leader, lets you ask questions and get accurate, projectable answers from 2,000 people nationwide in two days. Expert consulting, scrupulous attention to detail and comprehensive online research experience add to Harris Interactive's assurance that your most ambitious omnibus needs will be met accurately, reliably and on-time.  
(See advertisement on inside back cover)

HealthFocus, Inc.  
1140 Hightower Trail, Ste. 201  
Atlanta, GA 30350  
Ph. 770-645-1999  
Fax 770-518-0630  
E-mail: hfocus@bellsouth.net  
www.healthfocus.net  
Linda Gilbert, President

**Studies:**

HealthFocus

Hendal Research  
Meduliceva 13  
10000 Zagreb  
Croatia  
Ph. 385-1-4847-033  
Fax 385-1-4847-033  
E-mail: nena@hendal.hr  
www.hendal.hr  
Morana Kristek, Psychologist

**Studies:**

HR Omnibus  
n = 1,000 - frequency: 7/yr.





**ICR/International Communications Research**

605 W. State St.  
Media, PA 19063  
Ph. 610-565-9280  
Fax 610-565-2369  
E-mail: [icr@icrsurvey.com](mailto:icr@icrsurvey.com)  
[www.icrsurvey.com](http://www.icrsurvey.com)  
Steven C. McFadden, President

**Studies:**

**EXCEL**  
n = 1,000 - frequency: 104/yr.  
**TeenEXCEL**  
frequency: 12/yr.  
**SmallBizEXCEL**  
frequency: 12/yr.

EXCEL - National telephone omnibus survey of 1,000 consumers conducted twice each week. Interviewing through final tabulations in seven days. RDD sampling; CATI interviewing; custom options; extremely cost effective. TeenEXCEL - Monthly national telephone omnibus survey of 500 teens aged 12 to 17. SmallBizEXCEL - Monthly national telephone omnibus survey of 500 businesses with less than 100 employees. (See advertisement on p. 93)

IMI International  
40 Eglinton Ave. E., Ste. 701  
Toronto, ON M4P 3A2  
Canada  
Ph. 416-440-0310 ext. 231  
Fax 416-440-1768  
E-mail: [dmayo@imi-research.com](mailto:dmayo@imi-research.com)  
Don Mayo, Managing Director

**Studies:**

Promo Trak - Canada & U.S.  
Loyalty Trak - Canada & U.S.  
Event Trak - Canada & U.S.  
Sponsorship Trak - Canada & U.S.  
efacts

IMR Research  
140 Burlington  
Clarendon Hills, IL 60514  
Ph. 630-654-0147  
Fax 630-654-1047  
George Griffin, President

**Studies:**

Continuing Consumer Survey  
Power Tools/Accessories/Home Improvement  
Continuing Consumer Automotive Maintenance

INTAGE Inc.  
Global Services  
1-4-1, Honcho,  
Higashikurume-shi  
Tokyo 203-8601  
Japan  
Ph. 81-424-76-5164  
Fax 81-424-76-5178  
E-mail: [global-service@intage.co.jp](mailto:global-service@intage.co.jp)  
[www.intage.co.jp](http://www.intage.co.jp)

**Studies:**

INTAGEbus  
n = 1,500 - frequency: 12/yr.  
INTAGEbus for Males  
n = 1,000 - frequency: 4/yr.  
INTAGEbus Nationwide  
n = 15,000 - frequency: 2/yr.  
INTAGEbus Household Omnibus Survey  
n = 6,340 - frequency: 1/yr.

Interviewing Service of America, Inc.  
15400 Sherman Way, Ste. 400  
Van Nuys, CA 91406-4211  
Ph. 818-989-1044  
Fax 818-782-1309  
E-mail: [mhalberstam@isacorp.com](mailto:mhalberstam@isacorp.com)  
[www.isacorp.com](http://www.isacorp.com)  
Michael Halberstam, President

**Studies:**

Solutions

IPSOS - Reid Corporation  
100 S. 5th St., Ste. 2200  
Minneapolis, MN 55402  
Ph. 612-904-6970  
Fax 612-904-6980  
[www.angusreid.com](http://www.angusreid.com)  
Dennis Anspach, Exec. Vice President

**Studies:**

IPSOS-Reid US Express  
frequency: 48/yr.  
Canadian National IPSOS-Reid Poll  
frequency: 48/yr.  
IPSOS-Reid Global Express

# A Whirl of New Possibilities

ICR is moving ahead further and faster! We've developed proprietary capabilities in our Advanced Analytic Group and have combined the resources of our consulting divisions to provide a comprehensive package of marketing solutions:

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- **Web-Based Research** with our own panel of respondents
- **Loyalty and Customer Satisfaction Analysis** that provides greater reliability

Our new generation of highly sophisticated services enhances the wide range of traditional tools for which ICR has earned a solid reputation — tools like our custom research services and our **EXCEL<sup>SM</sup>** and **TeenEXCEL<sup>SM</sup>** omnibus studies.

**We Gather Insight.**



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[ICR@ICRSURVEY.COM](mailto:ICR@ICRSURVEY.COM)

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CHICAGO, IL

ST. LOUIS, MO  
DELRAY BEACH, FL  
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Issues and Answers Network, Inc.  
5151 Bonney Rd.  
Virginia Beach, VA 23462  
Ph. 757-456-1100 or 800-23-ISSUE  
Fax 757-456-0377  
E-mail: peterm@issans.com  
www.issans.com  
Pamela J. Jenkins

**Studies:**

Fifty Plus Omnibus  
Travel Agent Omnibus  
Issues of America - Newspaper Issues Omnibus  
Energy Trac - Energy/Utility Omnibus

Jacobson & Associates  
1510 Harlan Ln.  
Lake Forest, IL 60045  
Ph. 847-735-7250  
Fax 847-283-0124

**Studies:**

Customer Satisfaction - Steel Sheet  
Customer Satisfaction - Steel Plate  
Customer Satisfaction - Steel Minimills

Carrick James Market Research  
6 Homer St.  
London W1H 1HN  
United Kingdom  
Ph. 44-20-7724-3836  
Fax 44-20-7224-8257  
E-mail: cjmr@easynet.co.uk  
www.cjmr.co.uk

**Studies:**

CJMR Omnibus

Kadence Business Research  
85 Speen St.  
Framingham, MA 01701  
Ph. 508-620-1222  
Fax 508-620-1223  
E-mail: kadenceus@kadence.com  
www.kadence.com  
Owen Jenkins

**Studies:**

Electronic Pre Press  
frequency: 2/yr.  
Business Car Fleets  
frequency: 1/yr.  
Truck Fleets  
frequency: 1/yr.  
Independent Pharmacists  
frequency: 1/yr.  
Facilities Managers  
frequency: 1/yr.  
Nursing Home Directors  
frequency: 1/yr.  
Electrical Engineers  
frequency: 1/yr.  
Business Travel Managers  
frequency: 2/yr.  
Small Business  
frequency: 2/yr.

Leemis Marketing  
1 S. 270 Summit  
Oakbrook Terrace, IL 60181  
Ph. 630-889-1900  
Fax 630-889-0972  
E-mail: promodata@leemis.com  
www.leemis.com  
Rich Palesh, President

**Studies:**

Price-Trak  
Coupon-Trak  
Ad Activity  
Retailer Ad Digest - Drug/Mass Merchandise  
Retailer Ad Digest - Food  
Target Trak  
Volume Trak  
Custom Trak  
PTR - AdFax  
PTR - Hot Market Monitor

Market Analysis Ltd.  
190 Hymettus Street  
116 36 Athens  
Greece  
Ph. 30-1-756-4892-3  
Fax 30-1-701-9355  
E-mail: markanalysis@mail.kapatel.gr

**Studies:**

All Adults  
n = 1,000 - frequency: 10/yr.  
Motorists  
n = 500 - frequency: 1/yr.  
Catering Establishments  
n = 1,000 - frequency: 1/yr.  
Farmers  
n = 500 - frequency: 1/yr.



**Market Facts, Inc.**

3040 W. Salt Creek Ln.  
Arlington Heights, IL 60005  
Ph. 847-590-7000  
Fax 847-590-7114  
E-mail: nkane@marketfacts.com  
www.marketfacts.com  
Norm Kane, President

**Studies:**

TeleNation  
n = 1,000 - frequency: 156/yr.  
TeleNation Overnight  
TeleNation Tracker  
TeleNacion - Canada  
TeleNación  
TeleNations Global

Market Facts is unique in providing omnibus research through five distinct data collection options: TeleNation (three times weekly telephone surveys), TeleNacion (U.S. Hispanic telephone surveys), Data Gage and MiniScreen (monthly consumer mail panel studies). Multi-wave tracking studies are accommodated through TeleNation Tracker. Multi-country telephone research now available with TeleNations Global. Each of these products combines a solid research methodology with speed and affordability. (See advertisement on p. 95)

**Market Facts of Canada**

77 Bloor St. W.  
Toronto, ON M5S 3A4  
Canada  
Ph. 416-964-6262  
Fax 416-964-9333  
E-mail: tpayne@marketfacts.com  
www.marketfacts.com  
Peter Greensmith, Sr. Vice President

**Studies:**

National Flexibus  
National Superbus  
TeleNation - Canada  
TeleNation - Quebec

The Market Segment Group  
201 Alhambra Circle, Ste. 804  
Coral Gables, FL 33134  
Ph. 305-669-3900  
Fax 305-669-3901  
E-mail: gberman@marketsegment.com  
www.marketsegment.com

**Studies:**

Ethnic Market Report

Market Trends, Inc.  
375 Corporate Dr. S., Ste. 100  
Seattle, WA 98188  
Ph. 206-575-1222  
Fax 206-575-8779  
E-mail: infomanager@marketrends.com  
www.marketrends.com  
Jackie Weise, Exec. Vice President

**Studies:**

Opinion Monitor  
n = 400 - frequency: 12/yr.

Marketing Evaluations/TVQ, Inc.  
1615 Northern Blvd.  
Manhasset, NY 11030  
Ph. 516-365-7979  
Fax 516-365-9351  
E-mail: info@qscores.com  
www.qscores.com

**Studies:**

Performer Q Ratings  
n = 7,400 - frequency: 2/yr.  
TVQ Program Ratings  
n = 1,800 - frequency: 8/yr.  
Cartoon Q Ratings  
n = 3,600 - frequency: 2/yr.  
Cable Q Ratings  
n = 3,800 - frequency: /yr.  
Sports Q Ratings  
n = 2,000 - frequency: 1/yr.  
Product Q Brand Equity Ratings  
n = 1,800 - frequency: 2/yr.  
Kids Product Q Brand Equity Ratings  
n = 2,000 - frequency: 2/yr.  
Performer of the Past Q Ratings  
n = 1,500 - frequency: 1/yr.

Marketing Resource Group, Inc.  
225 S. Washington Square  
Lansing, MI 48933  
Ph. 517-372-4400  
Fax 517-372-4045  
E-mail: paulk@mrgmi.com  
www.mrgmi.com  
Paul King, Dir. of Survey Rsch.

**Studies:**

MRG Fall Michigan Poll  
MRG Spring Michigan Poll



MarketResponse International USA, Inc.  
6385 Old Shady Oak Rd., Ste. 270  
Minneapolis, MN 55344  
Ph. 952-943-2230  
Fax 952-943-2320  
E-mail: [decide@marketresponse.com](mailto:decide@marketresponse.com)  
[www.marketresponse.com](http://www.marketresponse.com)

**Studies:**

Health Monitor  
Consumer Brand Monitor  
Customer Satisfaction Monitor  
Insurance Monitor  
Retail Monitor

**MARPLAN**

Marktplatz 9  
63065 Offenbach/Main  
Germany  
Ph. 49-69-8059-0  
Fax 49-69-8059-243  
E-mail: [marplan.su@t-online.de](mailto:marplan.su@t-online.de)

**Studies:**

MCS  
n = 2,500 - frequency: 24/yr.  
MARPLAN CATI  
n = 1,000 - frequency: 12/yr.

**Mature Marketing and Research**

85 E. India Row, Ste. 30A  
Boston, MA 02110  
Ph. 617-720-4158  
Fax 617-723-1254  
E-mail: [mmrharris@aol.com](mailto:mmrharris@aol.com)  
[www.maturemarketing.com](http://www.maturemarketing.com)  
Dr. Leslie M. Harris, Managing Partner

**Studies:**

The Boomer Report  
n = 250 - frequency: 4/yr.

**Medical Data Management, sp.z.o.o.**

Ul. J. Sengera "Cichego" 1  
02 790 Warszawa  
Poland  
Ph. 48-22-645-77-33 or 48-22-645-77-30  
Fax 48-22-645-78-88  
E-mail: [ralph.bruin@mdmworld.com](mailto:ralph.bruin@mdmworld.com)  
[www.medicaldatamanagement.com](http://www.medicaldatamanagement.com)

**Studies:**

PROMOtest  
OTCbus  
ONCtrak  
MarketView

**MERCURY Marketing and Research Consultants**

31, Vasile Lascar Street, 3rd floor  
Bucharest 70211  
Romania  
Ph. 401-211-3967  
Fax 401-211-3970  
E-mail: [contact@mercury.ro](mailto:contact@mercury.ro)  
[www.mercury.ro](http://www.mercury.ro)

**Studies:**

Mercury Omnibus  
n = 1,500 - frequency: 12/yr.



- ★ 3,000 interviews weekly
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- ★ Straightforward results



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- ★ Twice monthly frequency



- ★ Global telephone research
- ★ Surveys Asia, the Americas and Europe

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Farmington Hills, MI 48334  
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Fax 248-737-5326  
E-mail: information@morpacem.com  
www.morpacem.com

**Studies:**

Market Opinion Reports

MRCA Information Services  
500 Summer St., Ste. 502  
Stamford, CT 06901  
Ph. 203-324-9600  
Fax 203-348-4087  
E-mail: dlearner@mrca.net  
Ken Murphy, Sr. Vice President

**Studies:**

Food Consumption & Nutrition  
Mail Received At Home  
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Consumer Product/Service Purchases

NFO Worldwide, Inc.  
2 Pickwick Plaza, Ste. 400  
Greenwich, CT 06830  
Ph. 203-629-8888  
Fax 203-629-8885  
www.nfov.com

**Studies:**

Multicard

NIPO, The Market Research Institute  
P.O. Box 247  
Grote Bickersstraat 74  
1000 AE Amsterdam  
The Netherlands  
Ph. 31-20-522-54-44  
Fax 31-20-522-53-33  
E-mail: info@nipo.nl  
www.nipo.nl  
Dr. Theo A. Hess, Managing Director

**Studies:**

Consumer Monitor CATI  
n = 1,000 Dutch Households  
Business Monitor - 400 Dutch Companies  
n = 400  
NIPO European Omnibus (7 Countries)  
NIPO CAPI@Homebus - 1,000 Households  
n = 1,000

Nippon Research Center, Ltd.  
Shuwa-Sakurabashi Bldg., 4-5-4 Hatchobori,  
Chou-ku  
Tokyo 104-0032  
Japan  
Ph. 81-3-3206-8351  
Fax 81-3-3553-0024  
E-mail: iijima@nrc.co.jp  
www.nrc.co.jp  
Hideo Nakamura, Deputy Manager

**Studies:**

NRC Omnibus  
n = 1,250 - frequency: 12/yr.

NOEMA Ltd.  
7 Stefan Karadja Str.  
1000 Sofia  
Bulgaria  
Ph. 359-2-981-6465 or 359-2-981-95-97  
Fax 359-2-981-6465  
E-mail: noema@bulnet.bg  
Margarita Boeva, Managing Director

**Studies:**

Noema's Omnibus

NOP Solutions  
Ludgate House  
245 Blackfriars Rd.  
London SE1 9UY  
United Kingdom  
Ph. 44-20-7890-9100  
Fax 44-20-7890-9555  
E-mail: solutions@nopres.co.uk  
www.nopres.co.uk  
Laurence Levy

**Studies:**

Random Location Omnibus  
n = 2,000 - frequency: 42/yr.  
Telebus  
n = 1,000 - frequency: 100/yr.  
Young Generation  
n = 1,000 - frequency: 12/yr.

Northwest Research Group, Inc.  
225 N. 9th St., Ste. 200  
Boise, ID 83702  
Ph. 208-364-0171  
Fax 208-364-0181  
E-mail: aritchey@nwrwg.com  
www.nwrwg.com  
Anna Ritchey

**Studies:**

Sound Stats - Boise, ID  
n = 400 - frequency: 12/yr.

Northwest Research Group, Inc.  
400 108th Ave. N.E., Ste. 200  
Bellevue, WA 98004  
Ph. 425-635-7481  
Fax 425-635-7482  
E-mail: hinn@nwrwg.com  
www.nwrwg.com  
Holly Inn, Research Coord.

**Studies:**

Sound Stats - Puget Sound, WA  
n = 400 - frequency: 12/yr.

**Opinion Search, Inc.**

1800 - 160 Elgin St.  
Ottawa, ON K2P 2C4  
Canada  
Ph. 800-363-4229  
Fax 613-230-3793  
E-mail: info@opinionsearch.com  
www.opinionsearch.com

**Studies:**

Express  
n = 2,000 - frequency: 12/yr.  
(See advertisement on the back cover)

ORC Macro  
aka Macro International Inc.  
116 John St., 8th fl.  
New York, NY 10038  
Ph. 888-MACRO-US or 212-941-5555  
Fax 212-941-7031  
E-mail: tduffy@macroint.com  
www.macroint.com

**Studies:**

Eastern EurOpinion Omnibus  
Eastern EurOpinion Woman Watch  
Eastern EurOpinion Teen Track  
Eastern EurOpinion Men's Monitor

Pan Arab Research Center - UAB  
P.O. Box 14680  
Dubai  
United Arab Emirates  
Ph. 971-4-337-6696  
Fax 971-4-3344-456  
E-mail: parcmain@emirates.net.ae  
www.arabresearch.com

**Studies:**

PARC Omnibus  
n = 600 - frequency: 4/yr.

PORI - Public Opinion Research of Israel, Ltd.  
P.O. Box 20114  
Tel Aviv 61200  
Israel  
Ph. 972-3-561-2443  
Fax 972-3-561-0960  
E-mail: pori@attglobal.net  
Itzik Rozenblum

**Studies:**

Face-to-Face Nationwide  
n = 1,000 - frequency: 8/yr.  
Face-to-Face Arab Population  
n = 600 - frequency: 2/yr.  
Face-to-Face Russian Population  
n = 800 - frequency: 2/yr.  
Telephone General Population  
n = 500 - frequency: 48/yr.  
Telephone Arab Population  
n = 400 - frequency: 24/yr.  
Telephone Russian Population  
n = 400 - frequency: 24/yr.

Quadrant Research Services  
49-51 Falcon St.  
Crows Nest, NSW 2065  
Australia  
Ph. 61-2-9959-4244  
Fax 61-2-9929-7050  
E-mail: quadrant@quadrantresearch.com.au  
www.quadrantresearch.com.au  
Andrew Buksin

**Studies:**

Quadrant Quik-Trak Omnibus  
n = 1,200 - frequency: 26/yr.



Research RBM  
Regementsgatan 106  
217 51 Malmo  
Sweden  
Ph. 46-40-98-01-70  
Fax 46-40-98-17-70  
E-mail: goran.lilja@rbmab.se  
www.rbmab.se

**Studies:**

The Telephone Bus

RJC Marketing Research Inc.  
New Yaesu Bldg. 10F  
3-5-12 Nihonbashi, Chuo-ku  
Tokyo 103-0027  
Japan  
Ph. 81-3-3273-5761  
Fax 81-3-3274-4802  
E-mail: kamoda@rjc.co.jp  
www.rjc.co.jp

**Studies:**

Tokyo Metro Bus  
n = 1,000 - frequency: 2/yr.  
Telephone Omnibus Japan  
n = 1,000 - frequency: 2/yr.

Robinson Research, Inc.  
524 W. Indiana  
Spokane, WA 99205  
Ph. 509-325-8080  
Fax 509-325-8068  
E-mail: info@robinsonresearch.com  
www.robinsonresearch.com

**Studies:**

Spokane County Residential Omnibus  
n = 400 - frequency: 6/yr.  
Koolenai County Residential Omnibus  
n = 400 - frequency: 4/yr.

Roper Starch Worldwide Inc.  
205 E. 42nd St., 17th fl.  
New York, NY 10017  
Ph. 212-599-0700  
Fax 212-876-7008  
E-mail: info@roper.com  
www.roper.com

**Studies:**

Limobus  
Roper Online Youth Omnibus  
Roper Online Adult Omnibus

RTNielson Company  
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Salt Lake City, UT 84111  
Ph. 801-359-1345 or 800-786-9946  
Fax 801-355-6335  
E-mail: info@rt Nielson.com  
www.rtnielson.com  
R. Benjamin Alley

**Studies:**

RTNielson Asks America  
n = 1,000 - frequency: 12/yr.

Service Research Corporation  
6201 S. 58th, Ste. A  
Lincoln, NE 68516  
Ph. 402-434-5000  
Fax 402-434-5006  
E-mail: kkluver@serviceresearch.com  
www.serviceresearch.com  
Kirk Kluver

**Studies:**

Agriculture Omnibus  
Gaming Omnibus  
Utilities/Energy Omnibus  
Health Care/Medical Omnibus

Simmons Market Research Bureau  
530 Fifth Ave., 10th fl.  
New York, NY 10036  
Ph. 212-373-8900  
Fax 212-373-8918  
E-mail: info@srmr.com  
www.smr.com

**Studies:**

National Consumer Survey  
The Hispanic Study  
Simmons Teenage Research Study  
Simmons Kids Study  
The Consumer Online Usage Study  
Comp Pro (Study of Computer Professionals)  
On-line User Survey

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174 Laurel Hill Rd.  
Mountain Lakes, NJ 07046  
Ph. 973-263-1409  
Fax 973-263-8490  
E-mail: sjwolff7@aol.com  
www.consumerviews.com

**Studies:**

Telecom 2001  
A Convergence of Tech. - Cons. Behavior & Attitude  
n = 5,000 - 7,000 - frequency: 2/yr.

Southeastern Institute of Research (SIR)  
2325 W. Broad St.  
Richmond, VA 23220  
Ph. 800-807-8981  
Fax 804-358-9761  
E-mail: SIR@SIRresearch.com  
www.SIRresearch.com  
G. William Greer, Dir. Client Services

**Studies:**

Baltimore Insight  
n = 300 - frequency: 12/yr.  
Washington Insight  
n = 300 - frequency: 12/yr.  
Richmond Insight  
n = 300 - frequency: 12/yr.  
Hampton/Norfolk/Virginia Beach Insight  
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www.panatantic.net  
Patrick O. Murphy, President

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SMS Omnibus Poll™  
n = 400 - frequency: 4/yr.

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San Diego, CA 92142  
Ph. 858-576-7141  
Fax 858-576-9235  
E-mail: darrel@vision-inc.com  
www.vision-inc.com  
Darrel Edwards, President

**Studies:**

Vehicle Experience Study

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100 N.W. 37th Ave., 3rd fl.  
Miami, FL 33125  
Ph. 305-649-5400  
Fax 305-643-5584  
E-mail: jstrouss@marketfacts.com  
www.strategyresearch.com  
Deborah Gonderil

**Studies:**

SRC Hispanic Omnibus TeleNacion  
n = 3,000 - frequency: 12/yr.

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

**Studies:**

Colorado Omnipoll

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Horsham, PA 19044-0189  
Ph. 215-442-9000  
Fax 215-442-9040  
E-mail: express@intersearch.tnsofres.com  
www.intersearch.tnsofres.com  
Jane Cutler

**Studies:**

EXPRESS  
n = 1,000 - frequency: 52/yr.

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Veenplaats 19  
1182 JW Amstelveen  
The Netherlands  
Ph. 31-20-645-53-55  
Fax 31-20-645-59-30  
E-mail: team4u@team4u.nl  
www.team4u.nl

**Studies:**

Team Vier Omnibus  
n = 1,000 - frequency: 12/yr.

Teenage Research Unlimited  
707 Skokie Blvd., 7th fl.  
Northbrook, IL 60062  
Ph. 847-564-3440  
Fax 847-564-0834  
E-mail: info@teenresearch.com  
www.teenresearch.com  
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www.ultexmr.com

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n = 1,000

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Ph. 602-707-0050 or 800-999-1200  
Fax 602-707-0055  
E-mail: answers@westgroupresearch.com  
www.westgroupresearch.com  
Ted Apostol, President

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5000 Odense  
Denmark  
Ph. 45-70-10-20-80  
Fax 45-70-10-20-81  
E-mail: wilke@wilke.dk  
www.wilke.dk  
Jakob Fiellau-Nikolajsen

**Studies:**

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CATI Consumer - Sweden  
n = 500 - frequency: 25/yr.  
CATI Consumer - Norway  
n = 500 - frequency: 25/yr.

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n = 150 - frequency: 4/yr.  
Congressional Omnibus  
n = 150 - frequency: 3/yr.  
Worldwide Monitor  
n = 600 - frequency: 2/yr.  
Office Trends  
n = 300 - frequency: 2/yr.  
Home Office Trends  
n = 500 - frequency: 1/yr.

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Fax 315-624-0210  
E-mail: marketing@zogby.com  
www.zogby.com  
Donielle Bradley

**Studies:**

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n = 900  
Zogby  
n = 600  
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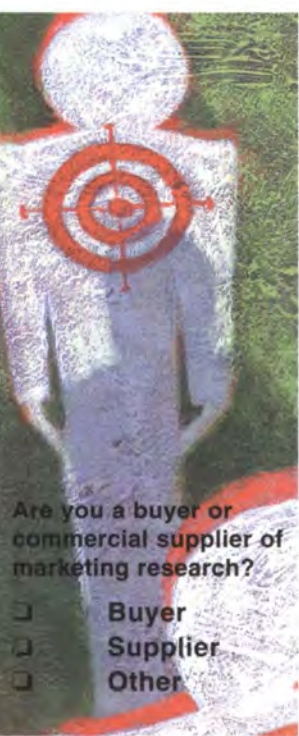


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# Trade Talk

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from smaller firms.

Products are arranged by category and within each category the most innovative products are prominently displayed. Some cross-category collections are being developed, including famous failures, famous successes, and a nostalgia area.

The Showcase is also used for legal and academic research. "There has been a fair amount of intellectual property work done there," Roos says. "A lot of times, the only package in existence for a given SKU is in the Showcase. Products have been used as exhibits in patent cases. Bob tells of one case where they were counting bristles on an eyeliner as part of a patent infringement case."

## Reverse the past


Roos has one main piece of advice for those developing new products: Reverse the past and learn from it but also connect it to the future. "We try to have a strong understanding of trends, but then we link that to things that have and haven't worked in the past. Some people focus on the future or on the past but not always both."

In addition, as obvious as it may sound, there must be a need for the product (or, in other words, its reason for being should make sense). Many products that fail are cute ideas that aren't grounded in a fundamental need. Roos cites the smokeless cigarette, which appealed to

non-smokers but not to smokers, and bottled water for dogs and cats as prime examples of senseless products.

"The most powerful ideas are the simplest," Roos says. "They take an existing idea or brand and they don't try to totally transform it but they give it a twist. For example, some of the things that are being done with Oreos, adding chocolate filling, seasonal varieties, etc. Co-branding and licensing are also options, such as Hershey's chocolate inside a muffin mix. It's pretty simple stuff but often it's the most powerful because it builds off an existing frame of reference."

Roos ended our phone conversation with a very Santayana-like anecdote about a repositioning project in the household products area. "We had done what I thought was some great work, come up with a bunch of different concepts, and tested them with consumers. We had a winning idea. The client was moving forward; they were very happy with it. And I went through the Showcase and looked at that product category and there was every idea we had come up with and tested. Somebody had done it some time over the past 20 years but maybe the timing was wrong, or maybe they didn't execute it right. Even the client couldn't have told you those products had been launched and some of them were from their own company.

"Companies sweep failures under the rug without learning from them. So there is great inspiration in looking at what people have tried in the past in your category and even in other categories, because there isn't a lot that is totally new in the world." 

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## Trade Talk

By Joseph Rydholm, QMRR editor

# Something old, something new

**G**eorge Santayana would have loved NewProductWorks. The philosopher who gave us the sage words, “Those who cannot remember the past are condemned to repeat it,” would have been thrilled that there is such a resource available to marketers, a repository of over 65,000 consumer products.

Formerly known as the New Products Showcase & Learning Center and founded by consumer product expert Bob McMath, the collection was renamed NewProductWorks after its acquisition in April by the Arbor Strategy Group (ASG), a marketing and management consulting firm. The collection was moved from its Ithaca, N.Y., home to Ann Arbor, Mich., where ASG is located.

McMath began collecting the products in the '60s but the bulk of the collection is from the past 15-20 years. Housed in a 7,400-square-foot facility, NewProductWorks includes 26,000+ foods, 8,000+ beverages, 13,000+ health and beauty products, 6,700+ household products, and 1,000+ pet products.

Marketing geek that I am, I of course think NewProductWorks would be a smash as a tourist attraction (I can already see the exhibits... “Green Apple-Scented Shampoo Through the Ages”). But Arbor Strategy Group puts it to a much more worthwhile use helping clients navigate the minefields of new product development.

“People have used it in big and small ways,” says Phil

Roos, president and CEO of NewProductWorks and Arbor Strategy Group. “If you think about the new product development process, a complete process includes an analysis of the current situation, an opportunity definition stage, a concept development stage, and then a commercialization stage where you refine the product and the packaging and launch it. There is a way to use the collection in any of those stages.

“We try to give clients customer-driven growth strategies, but with a real eye toward actionability. And that’s how [acquiring the collection] fit for us because we were doing a lot of new product consulting work, and we were looking for a real-world, practical tool as an alternative to some of the ways companies have been developing new products. We wanted a way to beat the new-product odds.”

Products are obtained through retail stores, from trade shows, and from manufacturers themselves. The collection is curated by McMath’s wife Jean. (The McMaths are always on the lookout for interesting products, Roos says: “When we were first looking at buying the collection, we were having lunch with the McMaths and we ordered in sandwiches and they wanted my potato chip package!”)

The collection contains virtually any major product launched by a large company plus a lot of products that were only in test markets and some notable products

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