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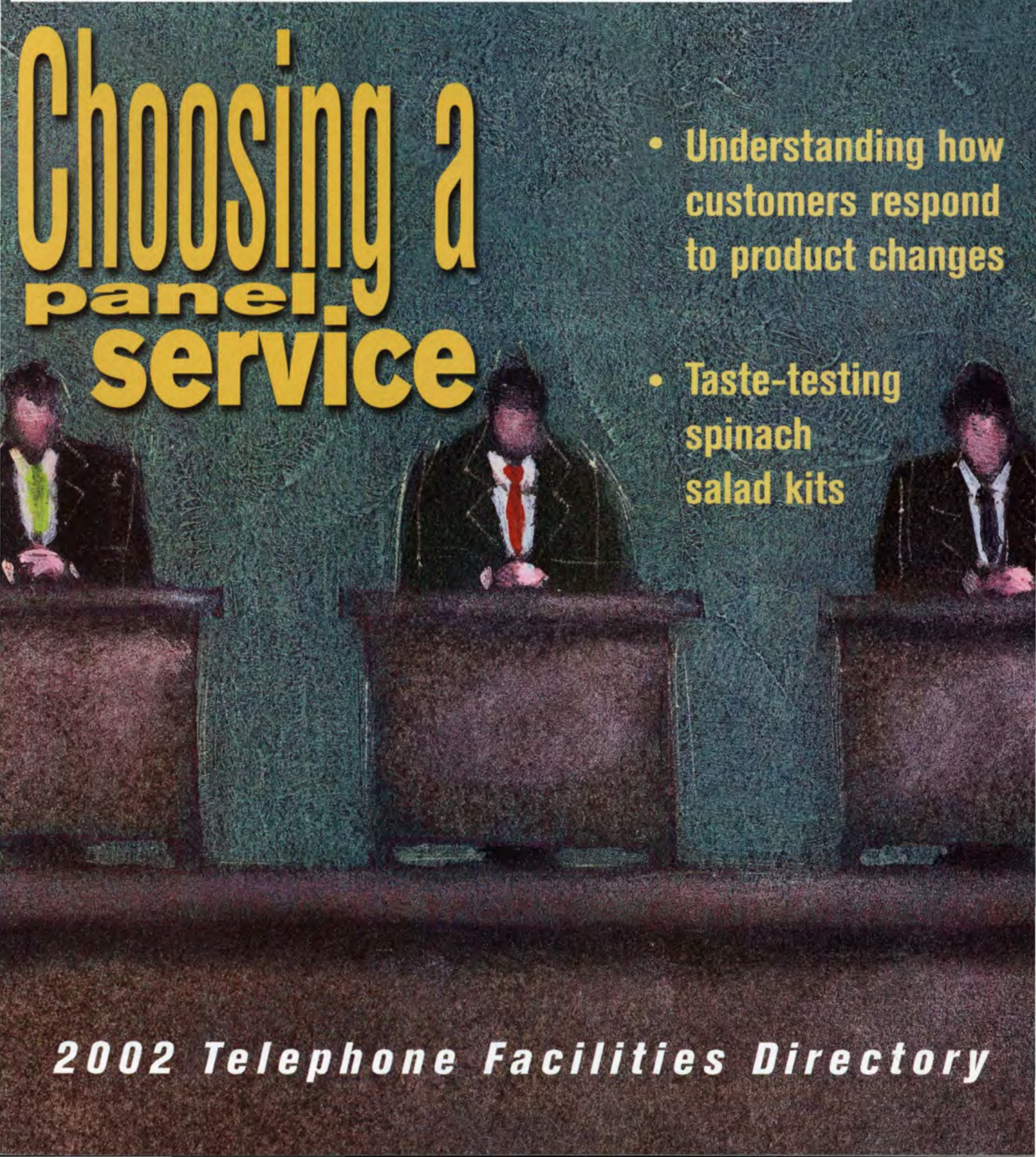
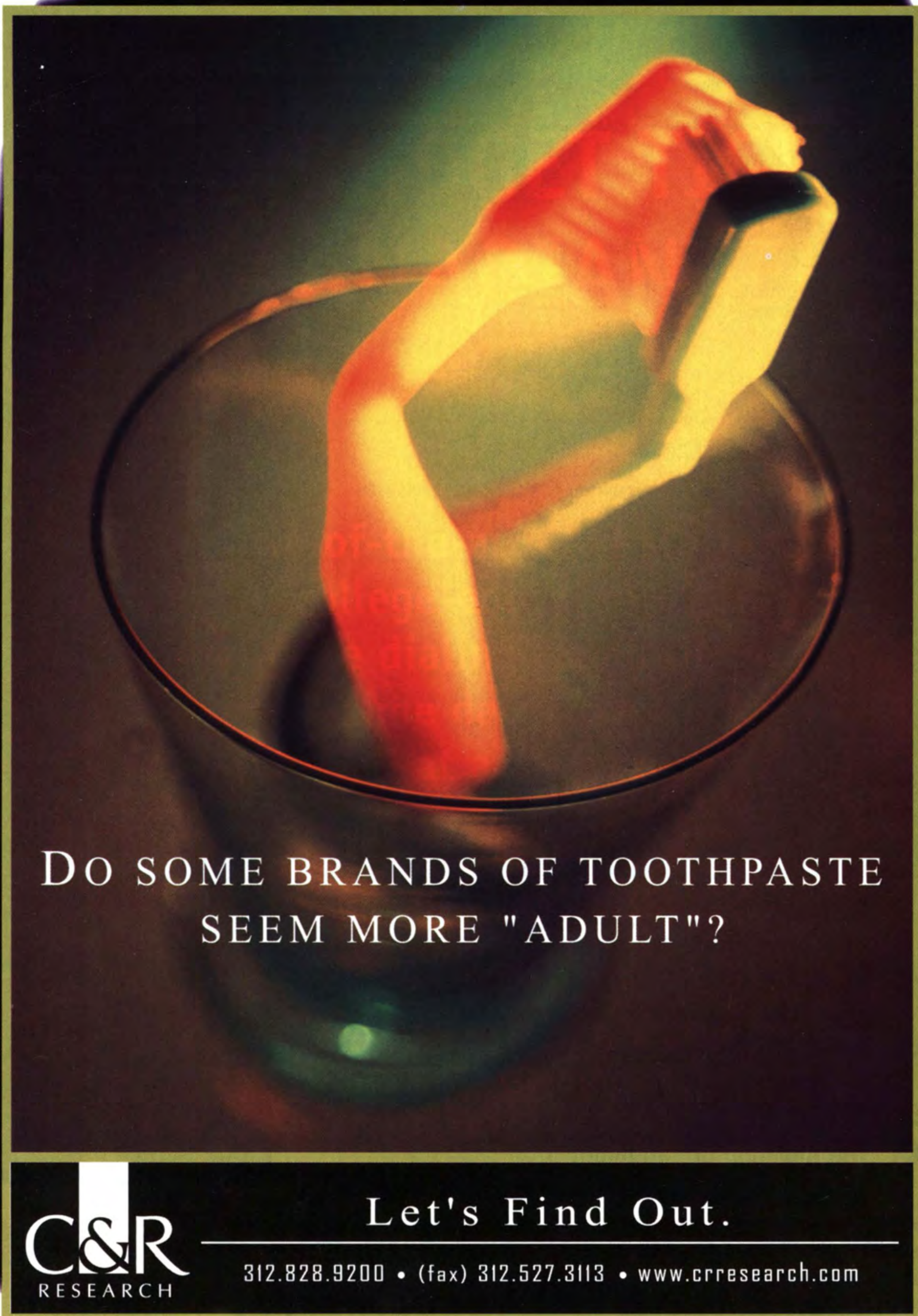


Choosing a panel service

- Understanding how customers respond to product changes
- Taste-testing spinach salad kits

2002 Telephone Facilities Directory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QUIRK'S Marketing Research Review

Volume XVI, Number 5 May 2002

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Bad teeth, good breath?

Less than one in 12 people in Britain say they have bad breath, compared to an average of 15 percent across the rest of Europe, according to findings from Taylor Nelson Sofres (TNS). Levels of bad breath were measured by asking people if they had experienced specific dental problems in the past six months, with bad breath as an option.

The research — carried out by TNS' European Toiletries and Cosmetics Database (ETCD) — compared perceived levels of bad breath amongst men and women in France, Germany, Italy, Spain, and Britain.

The findings show that 28 million people in Europe regularly use mouthwash at least once a week. British women are slightly more concerned about having fresher breath than British men, with three million women using mouthwash compared to 2.7 million men.

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More workers planning to travel this year

According to the February 2002 Xylo Report: Vacation Habits of Working Adults, 94 percent of American workers feel that time off from work increases their productivity, compared to a similarly high proportion last year (93 percent).

In spite of the rough economic landscape over the past year, more workers are planning vacations this year — more than three in four (77 percent) are planning to take time off in the upcoming year, compared to 70 percent in 2001. Seventy-two percent of workers also believe that they will travel during their time off, indicating an 8 percent increase from last year.

The Xylo Report is a national survey on work/life issues conducted six times yearly by Wirthlin Worldwide for Xylo, Inc., a Bellevue, Wash., provider of employee management systems. The company commissioned Wirthlin Worldwide to survey 1,003 U.S. adults over the age of 18 during the period of January 18-21, 2002. Fifty-nine percent of the 1,003 respondents qualified for this survey by being employed. For a sample size of 592, there is a margin of error of +/-3.1 percent.

The report studied the changes in public opinion today on vacation habits as compared to responses to the same questions asked a year ago in January 2001. The topics revisited include:
• how workers feel vacation time affects their productivity;
• how many employees plan to take a personal vacation in 2002;
• what vacation activities are most popular.

More than nine in 10 working adults (94 percent) feel that time away from work makes them better employees, with 70 percent reporting that it makes them feel a lot more productive — a slight increase from 65 percent last year. Singles are more likely than married workers to say that time off makes them a lot more productive (78 percent vs. 66 percent). Age also factors into time off and productivity, as almost eight in 10 (79 percent) workers under 35 report that vacation time makes them a lot more productive, compared to less than seven in 10 (67 percent) workers between ages 35 to 54.

Compared to 2001, singles are 18 percent more likely this year to report that time off makes them a lot more productive (78 percent vs. 60 percent). Almost three in four women (72 percent) also report that vacations make them a lot more productive, an 11 percent increase from last year (61 percent).

More workers are planning vacations this year, and more are planning to travel. The majority of survey respondents (77 percent) plan to take vacation time this year, indicating a 7 percent increase from last year. Seventy-two percent of workers believe that they will travel during their time off, compared to 64 percent last year.

Married respondents are most likely to travel — 77 percent are planning to travel during their vacations, compared to 66 percent of singles and 64 percent of divorced/separated respondents. Certain trends have developed relating to vacation plans and an employee's marital and parental status:

• 83 percent of married parents plan to take vacation; 76 percent will travel;

• 87 percent of married non-parents plan to take vacation; 84 percent will travel;

• 65 percent of single parents plan to take vacation; 60 percent will travel;

• 70 percent of single non-parents plan to take vacation; 67 percent will travel.

Workers who are taking time off work in 2002 plan to do the following (respondents were allowed to name more than one activity):

• outdoor activities (39 percent);

• visiting museums, famous landmarks, national parks, or sightseeing (28 percent);

• beach and water activities (27 percent);

• resting and relaxing (20 percent);

• socializing, visiting family and friends (17 percent);

• shopping (5 percent).

Summaries of this and other Xylo Reports are available at www.xylo.com.

Maritz Research, St. Louis, has named **Scott Brennan** account manager in its financial services research group. He is based in New York.

Art Savitt has been named president of *Datatelligence*, a new research firm in Parsippany, N.J.

Jade C. Cusick and **Sheila Mott** have joined New York-based research firm *Ziment* as director of client service.


Cusick


Meredith

Encino, Calif., research firm *E-Poll* has named **Tom Meredith** vice president, research.

International Communications Research (ICR), Media, Pa., has named **Robert Trulio** vice president, client services. In addition, **Joseph Jennings** has rejoined the firm as vice president, client services.

Michael Willens has joined Los Angeles-based *Adler Weiner Research/LA* as facility director.

David Clemm has retired as vice chairman of Rochester, N.Y.-based *Harris Interactive*. He will continue to serve on the company's board as an outside director. His responsibilities for global operations and Internet research development will transition to others within the company.

Rainer Ostermeyer has been named chief information officer at Germany-based *GfK*. He will continue as managing director of GfK Data Services.

Kathie Macmillan has been promoted to CEO of Toronto research firm *Goldfarb Consultants*. In addition, **Alonna Goldfarb** has been promoted to COO. **Bill Chambers** has been named to the newly created post of managing director – Europe. And **Orlando da Silva** has been named managing director at the firm's new Los Angeles office.

San Diego-based *Cardiff Software Inc.* has named **Dan Shirra** vice president of worldwide marketing.

Marcus Thomas, a Cleveland advertising and public relations firm, has named **Jennifer Hirt-Marchand** vice president in its research group. In addition, **Phil Johnston** has been named senior vice president in the firm's planning group. And **Amy Dana** has been named research associate.


Hirt-Marchand


Johnston


Dana

Nicholas J. Ferrari has been named CEO of *Erdos & Morgan*, a New York research firm. He replaces **John J. Bedell**, who has resigned.

Mike Pritchard has been named account executive with *Market Decisions Corp.*, Portland, Ore. **Patricia Birkle** has also been named account executive. She will work out of the firm's new office in San Francisco.


Pritchard


Birkle

Richard March has been named head of *RoperNOP Technology*, a new entity from RoperASW and NOP Research Group which will provide research and consulting services to U.S.-based technology companies.

Opinion Research Corporation, Princeton, N.J., has named **Thomas Shimko** global managing director, loyalty strategy.

Jean-Michel Carlo has been named chairman and CEO of *Ipsos Europe*. He will also sit on the group's global management board.

Jim Rose has been named a non-executive director of London-based *Market & Opinion Research International Ltd.* (MORI) to fill the vacancy left with the retirement from the MORI board of **Sir Denys Henderson**, former chairman of ICI. Rose will also become a member of the MORI audit and remuneration committee, and a trustee of the MORI pension trust.

The Institute for Public Relations, Gainesville, Fla., has elected new

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GMI, Quick Test partner for mall-based data collection

Seattle-based Global Market Insite (GMI) and Quick Test/Heakin, Jupiter, Fla., have introduced Net-Mall, a nationwide network of mall-based data collection facilities equipped with GMI's Net-CAPI platform for online Internet data collection. The announcement follows the execution in January of a multi-year license of GMI's Net-MR suite of tools. The Net-Mall service is designed to help researchers achieve the representativeness of traditional offline methodologies with the speed of the Internet and the flexibility of multimedia CAPI interviewing. This is achieved via the introduction of Net-CAPI interviewing tools into all of the Quick Test/Heakin mall facilities across the U.S., including support for large-format multimedia such as television commercials, movie trailers, advertising copy, and high-fidelity audio. Multimedia stimulus is hosted offline, locally at the facility to assure consistent media playback even in conditions where Internet connection is either slow or non-existent. Results are streamed in real-time using XML-based data transport enabling centralized quota management and real-time reporting and analysis of results. For more information visit http://gmi-mr.com/site/net-mall/.

New measure for pharmaceutical sites

Johnston, Zabor, McManus, Inc., a Research Triangle Park, N.C., research firm, is now offering its Standardized Website Measure, a normative measure of pharmaceutical Web site visitors' value perceptions. The Standardized Website Measure results in a single numerical score that reflects the value of all visitors, called the Visitor Value Index (VVI). The VVI encompasses all visitors including prescribing and non-prescribing patients, caregivers, physicians, and other health care providers. Derived from a statistical model developed using data from the firm's National Drug Website Benchmark Study, the VVI is similar to an IQ scale; 100 represents average Web site value compared to other pharmaceutical Web sites, 110 and 120 represent greater value perceptions than 84 percent and 98 percent, respectively, of similar Web sites. Reports generated from VVI scores help companies know how their Web sites compare to other pharmaceutical Web sites and which site aspects need the most improvement (and the impact each improvement will have on future visitors' value perceptions). For more information contact Dean Sanpei at 800-735-5448 or visit www.jzm.com.

U.S. Census 2000 data now available from GeoLytics

The U.S. Census Bureau has recently released the first two major sets of data from the 2000 Census: Redistricting and the "Short Form" (SF1). East Brunswick, N.J.-based GeoLytics offers these products in the block level or at the block group level, and larger geographies. The data has been compressed so that it generally fits on one disk and it comes with built-in mapping capabilities, based upon the new Census 2000 boundaries. Users can generate full-blown maps or tables and they can also export the data into a statistical software package, mapping, or other software package. For more information call 800-577-6717 or visit www.uscensus.info.

MarketView aids competitive Web analysis

New York-based Nielsen//NetRatings has introduced MarketView, a Web measurement reporting system, featuring content-based brand aggregation. MarketView allows companies to perform competitive analysis and media buying and selling with a business-driven view of Internet behavior. As part of Nielsen//NetRatings' Audience Measurement Service, MarketView supplies users with a view of real-time Internet research and analysis. The MarketView reporting system is built on a new aggregation structure consisting of channels, brands and parents, and is based on site content rather than the technical structure of a URL. The new system and reporting interface highlights the relationship or hierarchy of an organization within a parent company. The parent company rankings provide an overview of the leading sites from a business perspective, highlighting audience traffic data for a group of domains and URLs owned by one single entity. The brand rankings offer a consumer-based perspective, emphasizing audience traffic data based on brand segmentation within a company, rather than ownership. For more information visit www.nielsen-netratings.com.

New version of TELEform from Cardiff

Cardiff Software Inc., San Diego, has introduced TELEform v8.0, which offers features that enable organizations to remotely capture and process any type of form or document to a central server, thereby linking the paper world with the Web and legacy systems. TELEform v8.0 offers features including RecoFlex for OCR recognition, centralized system access, enhanced security, and remote capture. A new Connect Agent to Cardiff LiquidOffice enables TELEform v8.0 to initiate an e-form process. The LiquidOffice Connect Agent applies processes to the electronic forms for routing, tracking, and approval.

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Research Industry News

News notes

London-based **Market & Opinion Research International Ltd.** (MORI) was the fastest-growing top 10 market research agency in Britain in 2001, for the second year running, according to figures released by the British Market Research Association. MORI's sales grew by 26 percent in 2001, following 27 percent growth in 2000.

Acquisitions

U.K.-based **Millward Brown** has acquired **Firefly**, a Thailand research and consulting firm. Millward Brown Thailand, as the new company will be known, will be managed by Mark Ryan, formerly director of qualitative research at ACNielsen. Daren Poole, formerly based in Millward Brown's Singapore office, will relocate to Bangkok to help establish the quantitative division.

SPSS Inc., Chicago, has acquired **LexiQuest Inc.**, a developer of linguistics-based information management software. The acquisition combines LexiQuest's experience in linguistics-based text mining with SPSS's data mining capabilities.

The MRCGroup Research Institute, Las Vegas, has acquired **Studio 11 Productions**, a firm with proprietary multimedia platforms and a video player that provides MRCGroup entry into the online travel, entertainment ticketing, and room-booking industries. Re-branded as MRCStudio11, the company features two primary products: COLTS (Custom On-Line Ticketing System) and COLRRS (Custom On-Line Room Registration System).

Informark Pty. Ltd., an Australia research firm, has become a wholly-owned subsidiary of **GfK Marketing Services Australia**. With a staff of 14, Informark achieved total revenue of approximately EUR 0.7 million in financial year 2001.

Separately, Germany-based GfK increased its stake in a joint venture, **ORG-GfK Marketing Services (India)**, from 26 to 40 percent. For financial year 2001, ORG-GfK Marketing Services earned total revenue of around EUR 0.6 million.

Also, GfK has increased to 100 percent its holding in French research company **M2A**.

Alliances/strategic partnerships

SPSS MR, Chicago, has forged an alliance with **Optimum Pay**, an online payment service. With Optimum Pay,

Research Calendar

The Society of Insurance Research will hold a workshop series — themed "Developing and Using Customer and Competitor Information to Best Advantage in a Tumultuous World" — on May 19-22 at the Hyatt Regency Crown Center Hotel in Kansas City, Mo. For more information visit www.sir-net.org or call Stan Hopp at 770-426-9270.

The American Marketing Association (AMA) will hold its annual advanced research techniques forum on June 2-5 at the Vail Marriott in Vail, Colo. For more information visit www.marketingpower.com.

The Marketing Research Association (MRA) will hold its annual conference on June 5-7 at the JW Marriott in Washington, D.C. For more information visit www.mra-net.org.

The American Marketing Association (AMA) will hold its school of marketing research techniques on June 9-14 at the University of Notre Dame, South Bend, Ind. For more information visit www.marketingpower.com.

The European Society for Opinion and Marketing Research (ESOMAR) and the Advertising Research Foundation (ARF) will hold a "Week of Audience Measurement" on June 9-14 in Cannes, France. For more information visit www.esomar.nl.

Frost & Sullivan will hold its Advanced Marketing Research Asia Conference & Exhibition on June 10-12 in Singapore. For more information visit http://summits.frost.com/MRA.

The Commercial Development and Marketing Association Educational Foundation (CDMAEF) will hold The Basic Market Research Short Course, another in its series of market research programs, on June 11-13 at the Marriott Hickory Ridge Conference Center, Lisle, Ill. For more information call Vaughn Wurst at 215-564-3484 or visit www.cdmaonline.org.

Canada's Professional Marketing Research Society (PMRS) will hold its annual conference on June 12-14 at the Nottawasaga Inn, Alliston, Ontario. For more information visit www.pmrs-aprm.com.

The European Pharmaceutical Marketing Research Association (EphMRA) will hold its annual conference on June 24-28 at the Sheraton Hotel and Towers in Brussels. For more information visit www.ephmra.org.

Target Marketing of Santa Barbara will hold its "E-metrics Summit", a forum on determining how to answer e-metrics questions, on June 25-26 at the Four Seasons Biltmore, Santa Barbara, Calif. For more information visit www.TargetingEmetrics.com.

News spotlight

Market research professionals who changed jobs in 2001 experienced base salary increases averaging 17.9 percent, according to data from Smith Hanley Associates, an executive recruiting firm. In 2000, researchers averaged 16.2 percent base salary increases.

Marketing statisticians who changed jobs in 2001 felt the effects of the economic slowdown on base salary increases. In 2000, this group (often known as marketing scientists, they handle tasks like forecasting, etc.) experienced a 24.3 percent average increase over their previous salaries. In 2001, the average increase was 11.4 percent, reflecting the impact of the downturn on the consulting and Internet-related businesses that are heavy users of marketing statisticians' services.

The disparity of the 2000 increases between statisticians and researchers was primarily a function of demand, driven by the boom in hiring by the consulting and Internet firms. Marketing statisticians were in a better position than market research professionals to take advantage of skyrocketing salaries because they had the CRM and database marketing skills companies sought.

"Market research, with large groups in the consumer packaged goods and pharmaceutical industries, remained a consistent area of hiring and employment during the past two years," says Linda Burtch, senior managing partner, Midwest practice, Smith Hanley Associates. "Market research professionals by and large remained with these stable, steadily growing industries, which in 2001 gave them the salary increase advantage over marketing statisticians, who experienced the boom-bust cycle of the Internet and consulting services industries."

Smith Hanley has seen steady improvement in the job market for researchers and statisticians since late in 2001. "We anticipate that the recovery will take place over several months and the demand for marketing statisticians will continue to build primarily due to hiring by the pharmaceutical, consumer packaged goods, and insurance industries. While we have seen a continuous demand for market research professionals, we expect for those who change jobs in 2002, salary increases will remain relatively steady." Burtch says.

Things look especially good for well-qualified job seekers. Burtch says clients have expressed frustration at the amount of time it's taking to fill research positions, especially those requiring two to seven years of experience. There are candidates for those jobs but they aren't always the best-trained, as those with better experience and know-how have either been retained by savvy employers (who have let lesser-talented workers go) or have chosen to stay in their current positions rather than test the waters elsewhere.

customers can create differentiated incentive programs to drive cooperation rates in surveys. Incentives are paid in cash, paid directly into bank accounts, as points, or by paper checks for those unwilling to accept electronic rewards.

Separately, the business intelligence division of SPSS Inc. has announced that **KXEN**, a global analytic software company that provides modeling technology for users of data mining, has become a member of the Clementine Plus Partner Program and will integrate the KXEN Analytical Framework with Clementine, SPSS Inc.'s data mining product.

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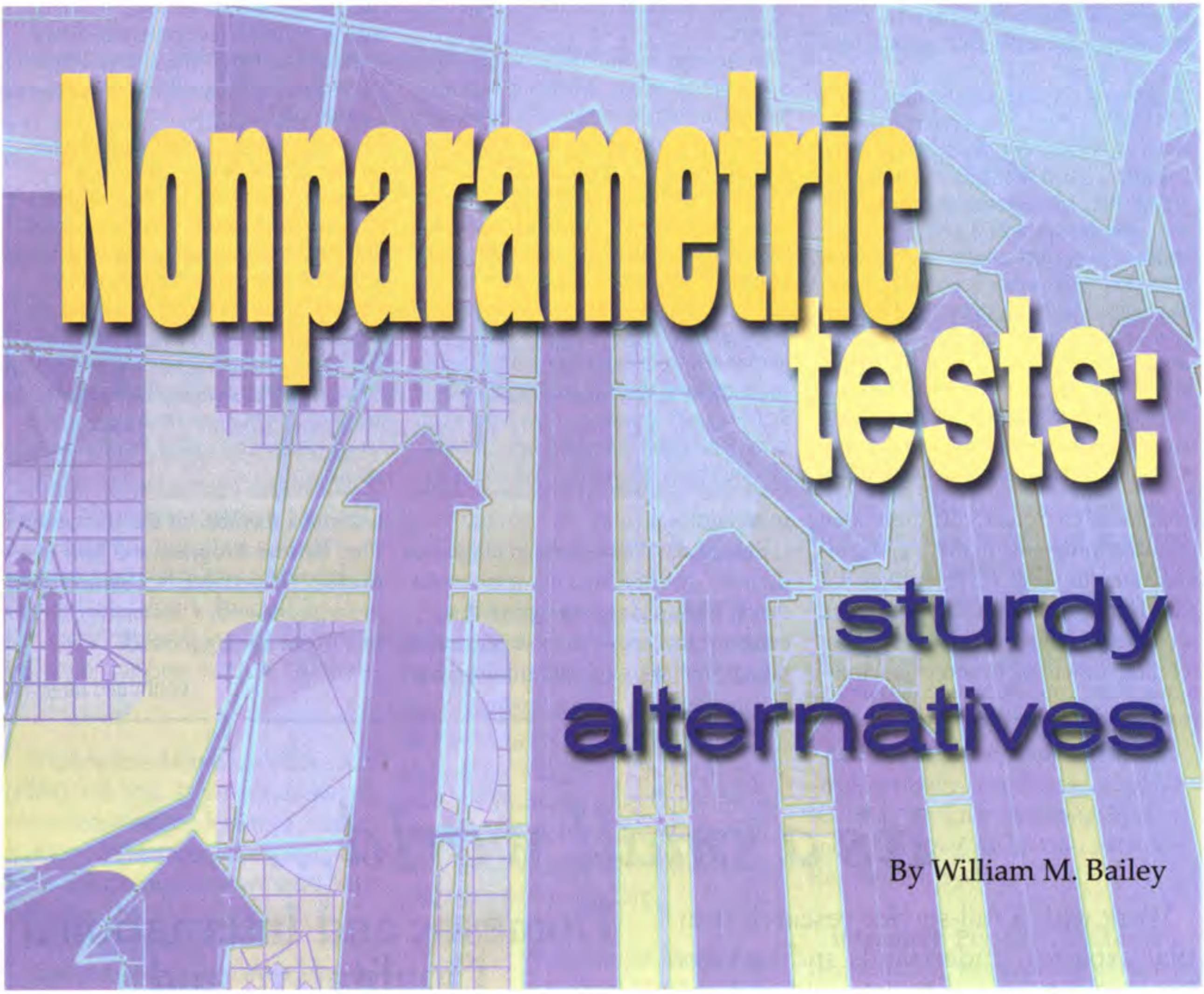

Nonparametric tests: sturdy alternatives

By William M. Bailey

Editor's note: William M. Bailey is principal of WMB & Associates, an Orlando, Fla., statistical services firm. He can be reached at 407-889-5632 or at wbailey@worldramp.net.

Does this situation sound familiar? "I can't afford the research plan you advise! Is there a way we can do fewer surveys but still get usable and reliable results?" The current economic conditions have affected strategies of consumer research. As a result, more and more clients are trying to find ways to cut costs while at the same time delivering to business objectives.

As market researchers, we tend to focus on crosstabulations that offer paired tests of proportions and generally take the results right to the portion of the final report that details the statistical results. This is not necessarily intended to be a criticism; it's just the way we typically do consumer research. While this works in many cases, this author is finding that clients are asking somewhat different questions: "How do these two products differ in comparison to these other two?" "Is there a difference in opinion by product within gender or age or...?" They also ask, "How do these product features rank as they apply to the respondent's overall opinion of my company?" As you can see, these questions begin to move things beyond the realm of basic data evaluation.

The preferred research plan is to interview a sufficient number of consumers to make the results statistically reliable at the 90 percent or 95 percent level of confidence with a certain margin of error, e.g., ±5 percentage points. Why? Because that is what we have always done! Depending on how one sets the constraint parameters, this works out to be from 250 to 350 completed interviews at the base level of analysis and then we work up from there. With this base we can apply standard analysis tools such as paired t-tests, analysis of variance, and factor or regression analysis with reasonable comfort. Further, for this

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War Stories

True-life tales in marketing research

By Art Shulman

Editor's note: War Stories is a semi-regular feature in which Art Shulman, president of Shulman Research, Van Nuys, Calif., presents humorous stories of life in the research trenches. He can be reached at 818-782-4252 or at artshulman@aol.com.

A few weeks ago we received a report of an incident where a client observing a focus group actually fell through the mirror. But upon tracking it down, the owner of the facility where it purportedly happened said it was not true. So, we're still looking for an instance of this market research myth (at least it's a myth so far).

When Lloyd Wohlner of Isis Research was doing market research at a consumer magazine a few years ago, he mailed out a survey on topics his readers would like to see in future issues. One man mailed back a response indicating a high interest in hand tools and no interest in cars, which was a very unusual response compared to the magazine's typical male respondents. Then Wohlner checked the ZIP code against the original mailing list. The respondent lived in Ossining, N.Y. — Sing Sing prison to be exact. Wohlner wondered whether the respondent's interest in cars would increase after he used certain hand tools.

In his "On the Way" column in the January issue of *Cactus Call*, the newsletter of the Southwest Chapter of the Marketing Research Association, J. Patrick Galloway of Galloway Research noted that interviewers sometimes make cryptic notes on their questionnaires to explain things. For example, on an incomplete door-to-door callback questionnaire an interviewer wrote the letters SOP. Turned out this stood for "snake on porch." Another interviewer had written DAPP. Later, the interviewer explained that this meant the respondent had "died after product placement."

Galloway also cited a telephone study of recent appliance purchasers, where one 93-year-old respondent expressed an interesting view of extended warranties. Interviewer: "And why do you say you would 'definitely not' purchase an extended warranty for your new dishwasher?" Respondent: "Honey, at my age I don't even buy green bananas."

A researcher who prefers anonymity was in the back room observing one-on-one interviews on air fresheners. In the middle on an interview about creating a lovely-scented social evening, a respondent said to the moderator, "I'm a born-again Christian. Do you know what that is?" The respondent proceeded to try and "save" our moderator, who happened to be Jewish. The moderator was polite but didn't look at the literature left at the front desk, and to this day remains unconverted.

Doug Conwell of the *Tampa Tribune* reports conducting a focus group for an outside client, a local hospital. One participant at the group assumed that the *Tribune* was doing some kind of exposé of the hospital, where her husband had recently passed away due to a mistake. As soon as the group got started, during introductions, she told her tale of woe and was quite distraught. She went into all kinds of detail, sobbing madly, confessing to being suicidal and that she would never get over it, etc. The poor moderator, rather new to moderating, was at a loss as to how to continue the group effectively. After all, you can't really say, "Other than that, how did your husband like the food at the hospital?" It's like, "So Mrs. Lincoln, how was the play?"

In future issues, we'll report on more quirky, loopy, and strange happenings in the world of market research. If you'd like your story to be told — anything related to research is usable, from spilling soup on your client's new suit to cute answers respondents provide on questionnaires — please e-mail me at artshulman@aol.com.

Supplier Side

Telephone data collection part 1: outsource or do it yourself?

By Michael Mitrano

Editor's note: Michael Mitrano is a principal at Transition Strategies Corporation, a management consulting firm serving the research industry. He can be reached at mmitrano@transitionstrategies.com. The author would like to thank Todd Myers of Opinion Research Corporation for his helpful review of this article.

When I came into this industry in the early 1980s, many clients felt that if you didn't do your own telephone interviewing, you couldn't assure a quality job. That feeling was particularly true with respect to large full-service research companies, which presumably had the business volume and management resources to support their own phone center if they chose to do so.

Since then, a lot has changed. While some clients still feel that their suppliers should carry out all of the research steps in-house, most no longer feel that way. At the same time, running a phone center has become more difficult than it was 20 years ago — and it wasn't easy then! For these reasons, many more full-service companies outsource their telephone interviewing. Should you?

The considerations

In weighing the decision to start a phone center, increase your phone capacity, cut it back, or get out of that business altogether, the astute research company executive has to consider a number of factors. Among these are cost, quality, scheduling control, and technology.

Cost

Phone interviewing has been under cost pressure for years as respondent cooperation has dropped and interviewer wages have risen. With data collection as the biggest item in most study budgets, it comes under great scrutiny. Is it cheaper to outsource your work than to do it in-house? Sometimes it is. Three variables come into play.

Location is one of the most important determinants of phone center cost. As phone interviewing has moved completely to CATI and high-speed data connectivity has become common, managers have realized that phone centers can be located far away from the researchers they serve. In fact, the best locations for research companies are usually the worst for phone centers. Being close to clients and a skilled professional labor pool is great for company headquarters, but co-locating a phone center there may mean that you pay high rents and labor costs in order to secure the bottom rung of the local workforce as your interviewers. In contrast, an isolated small town can bring you both low costs and a more committed, stable workforce.

Second, managing operational facilities requires different talents, styles, and tools than running a staff of professional researchers. Managing these facilities at a distance — and perhaps in a part of the country with culture and values that differ from those at headquarters — is even trickier. The stronger operational management of a data collection company can sometimes get gain greater productivity from a workforce than the managers of a full-service company could.

Finally, one's ability to keep a phone center full has a huge impact on cost. With their dedicated sales forces, some interviewing subcontractors can keep their facilities fuller than their full-ser-

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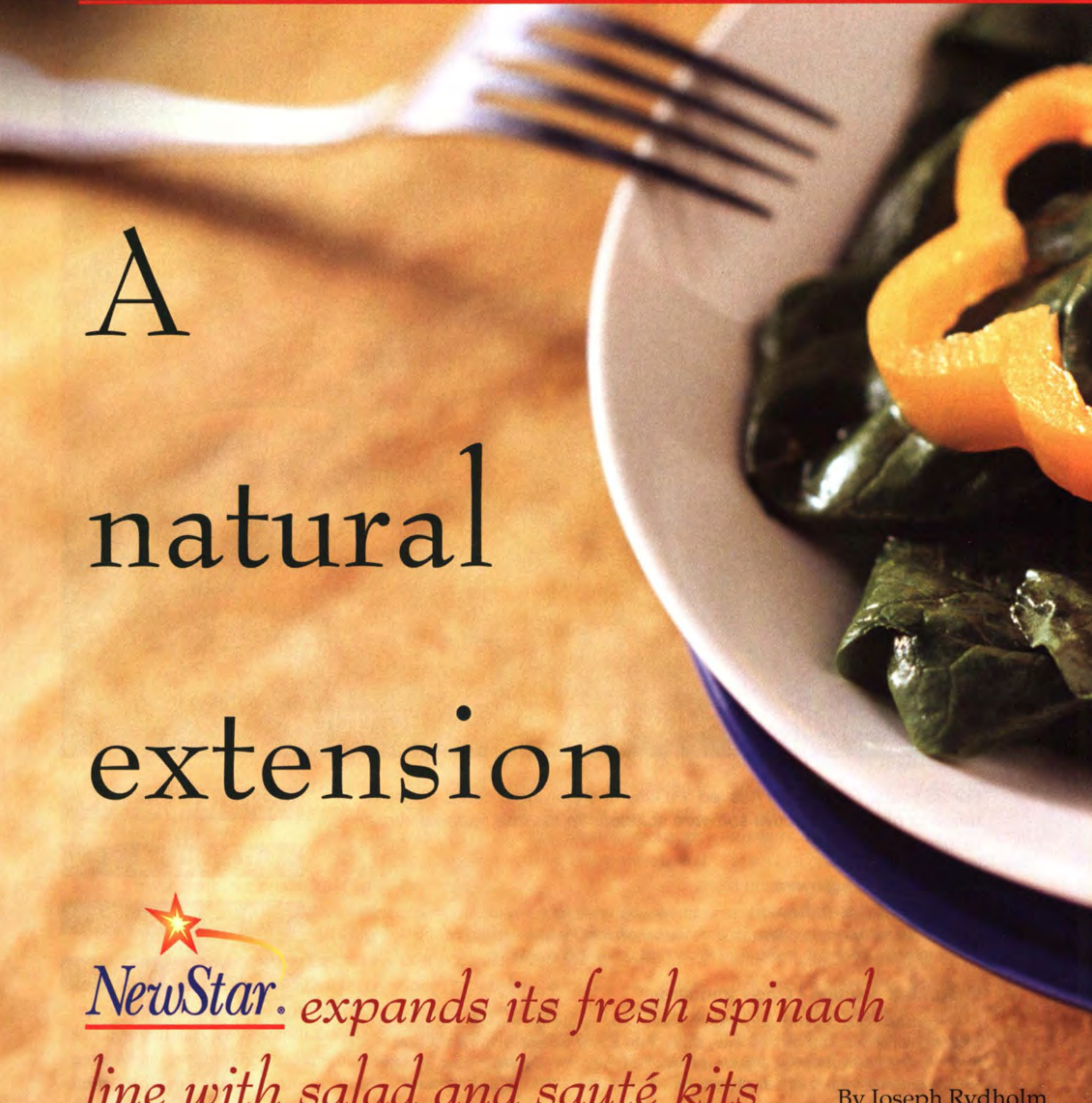

A natural extension

NewStar expands its fresh spinach line with salad and sauté kits

By Joseph Rydholm
QMRR editor

On the heels of the successful launch of its Young & Tender line of bagged spinach, NewStar, a Salinas, Calif.-based produce firm, was wondering what to do for an encore. A line of salad kits featuring spinach in combination with a dressing and/or other ingredients seemed like a natural idea. But rather than introducing a me-too product to the already-crowded salad kit market, the company wanted to add a gourmet twist. "We thought we had a pretty good system for growing and processing spinach," says Bob Whitaker, NewStar's vice president of R&D and value-added operations. "And our idea was to leverage that to the next step to come out with a line of gourmet spinach salad kits. We

chopped walnuts and cranberries. The "3-Minute Sauté" kit is flavored with sun-dried tomato and roasted garlic.

Idea generation

The process began with an idea generation phase, says Christie Hoyer, vice president of product development and evaluation, The National Food Laboratory. Sessions were conducted with NFL chefs, food technologists, and other culinary arts workers. "We did a number of brainstorming sessions, game-playing, and other, more coordinated exercises. From that we came up with numerous flavor concepts for the salads and the sauté mixes. The next step was to use filtering techniques — we had a large number of flavors and we were trying to get them down a manageable number and also come up with the best ideas to propose to NewStar," she says.

The filtering involved looking at trends in the restaurant industry and also looking at technical feasibility, to find ideas that would be attractive to consumers but also workable from a food technology standpoint.

The list was pared to six flavors — three salad kits and three sauté mixes — which were then evaluated by NewStar management, a process that helped ease worries that the company might be taking too big a step in introducing a line extension, Whitaker says. "We went to the NFL facilities with our marketing people and tasted the products and talked about them. That built up a sense of ownership within our company because we're a produce company, we're not heavily endowed in marketing research capabilities. So it was useful to meet with the food technologists and taste the prototypes because it made us confident that we were on the right track."

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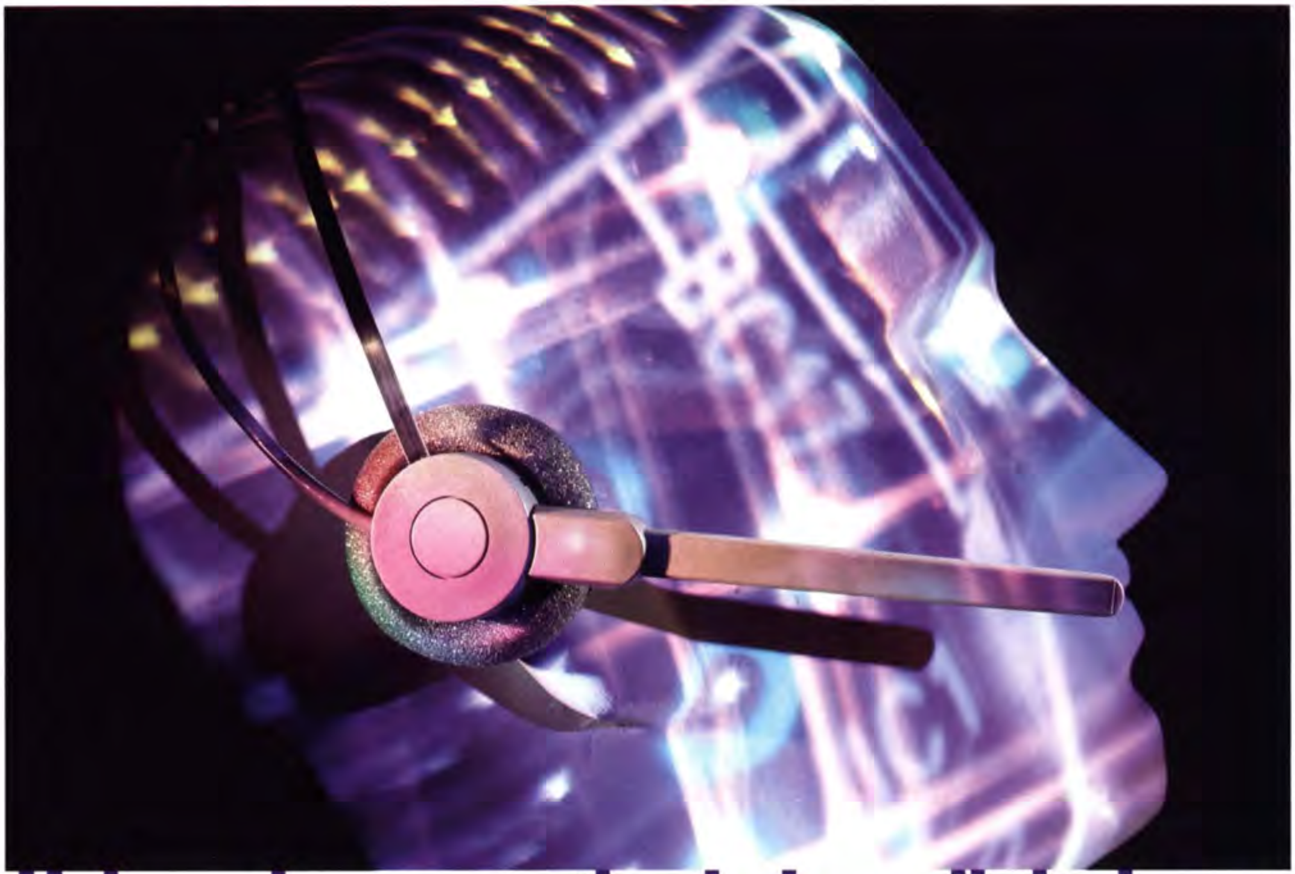
really wanted to see some high-end flavor profiles put together with our spinach so we could offer our customers something a little bit better."

Working with The National Food Laboratory (NFL), a Dublin, Calif., research firm, NewStar was able to dream up, test, and bring to market the Young & Tender line of spinach salad and sauté kits. The salad kits, which debuted in 1999, come in "crispy bacon" and "honey citrus" dressing varieties and feature accompaniments like bacon pieces or



Using phone methods in a digital age

A look at Web/phone hybrid survey deployment

By Al Fitzgerald

Editor's note: Al Fitzgerald is president and founder of Answers Research, Inc., Solana Beach, Calif. He can be reached at 858-792-4660 or at info@answersresearch.com.

As companies strive to gain a footing in today's uncertain economy, marketers are faced with a difficult mission: to conduct the most useful research studies while spending the smallest percentage of their reduced research budgets. It seems, more than ever, marketers are under pressure to retain current customers, tap into additional markets, and refine existing offerings while creating new products/services based on vital customer feedback. With worldwide Internet usage continually rising, online panel research is a logical method to complete actionable and economical market research projects. But despite the surge in popularity of online methods, telephone deployment remains a viable technique. In fact, combining a traditional telephone approach with innovative online deployment methods may be just the way to achieve marketers' sought-after goal of low-cost research with high-quality results.

Combined Web and telephone deployment solution

Here's how it works. Once the survey is finalized, it is programmed for computer-assisted telephone interviewing (CATI) and Web completion. By providing for both techniques simultaneously, programming costs are not increased; this dual-programming accommodates both methodologies. Further, with either method, no respondent is able to take the survey more than once. Any skip patterns, rotations, and randomizations are programmed once but serve a phone or Web purpose. Additionally, English surveys can be translated into multiple languages, including Japanese, Chinese, and Korean character translation.

You've determined who you are tar-

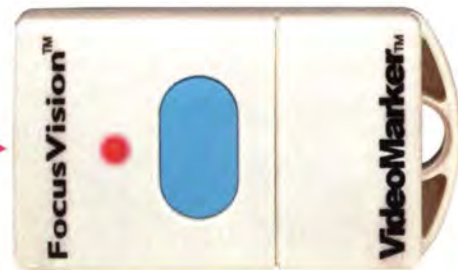
geting when you planned your study and created the survey instrument. Once you have a reliable sample source with which to reach your group you're ready to begin your telephone recruitment. Using the mixed-method approach, participants are screened and initially invited to take the survey via telephone. If convenient for the qualified respondent, the interview is completed at this time. If a respondent refuses to participate, they are given the option to take the survey over the Web. In this case, collecting their e-mail address and e-mailing them a password-protected link to the survey are the next steps.

Deployment methods impact response rates

One of the biggest deterrents to completing a successful research project is finding qualified participants to respond to your survey. If a project manager gets tripped up in the fielding portion of the study, it can cost valuable time and precious budget dollars while decreasing the time that can be spent studying and using gathered data. Particularly when faced with the host of typical fielding pitfalls — limited sample, a busy or over-surveyed population, and restricted incentive allotments — it becomes critical to offer respondents the most convenient method possible to increase response rates.

When conducting business-to-business studies, most researchers find that small businesses are often the most difficult of all target audiences to elicit cooperation to take surveys. In research where contacting the business owner or general manager of a company is critical, taking valuable time away from store or business management to participate in a market research study may not even make the top 20 on a manager's daily list of "fires" to extinguish. Further, while many small firms do not have Internet connections, virtually all small business executives/owners have Internet access at their homes. By offering the opportunity to participate at a time and with a method most convenient, response rates inevitably rise.

Now, mark and clip your focus group highlights, live.



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Another research target becoming increasingly difficult to reach is the IT professional. While this group has a vested interest in participating in research that will impact future product designs vital to their job functions, they are a regularly-contacted population. To gain the necessary feedback from this critical target, it is important for researchers from advanced technology manufacturers and service providers to consider strategies that will encourage IT manager participation. Offering the option of either online or telephone completion can provide the flexibility needed to secure the opinions of this group.

Larger sample sizes = greater statistical accuracy

Regardless of the participant criteria, a research project's statistical accuracy is largely a function of the sample size. The larger the sample size, the greater the statistical accuracy of the results. Keep in mind that we often will want to look at a subset of the entire sample which we call a "cell" (e.g., small companies versus large companies). When this is the case, the statistical accuracy depends on the number of people in each cell. While at some point, the increase in statistical accuracy may not be worth the additional cost, to achieve a statistical accuracy of ±5 percent, a sample size of 400 must be reached. When dealing with populations that are difficult to contact (often coupled with limited sample with which to approach them), a goal of 400 completes might as well be 4,000 — an equally impossible and exhausting goal. Offering the proposed dual-methodology can help minimize the strain of fielding while maintaining statistical accuracy.

Case study

My firm has successfully implemented the suggested telephone/Web-based approach and we have seen response rates increase dramatically in studies using this technique. In a study completed for a computer hardware manufacturer in November 2001, we recruited respondents from small, medium, and large businesses and gave them the option of completing the questionnaire immediately by phone or via the Web at a later time. Approximately 80 percent of the respondents opted to complete the survey via phone, and 20 percent online. Most of the online respondents initially indicated that they were too busy to take the survey. The only way to elicit their cooperation would have been to try to schedule expensive (and inefficient) call-backs. Because the screening criteria for these upper-level IT managers were so stringent, the cost per completed interview by phone was over $135. By completing 80 surveys by Web, we saved our client to cost of recruiting an additional 80 phone respondents. In short, use of the dual-methodology saved our customer over $10,000 and several precious project timeline days.

Limitations

No deployment method is without limitations. While a dual-method approach works well with many study designs, it works best among populations having both phone and Web access. Careful monitoring of results by mode must be conducted to ensure there is not a vast difference in results among methods. If a study is to sample a general population without the use of weighting or other data manipulation methods, a single methodology, random digit dial (RDD) approach may be necessary.

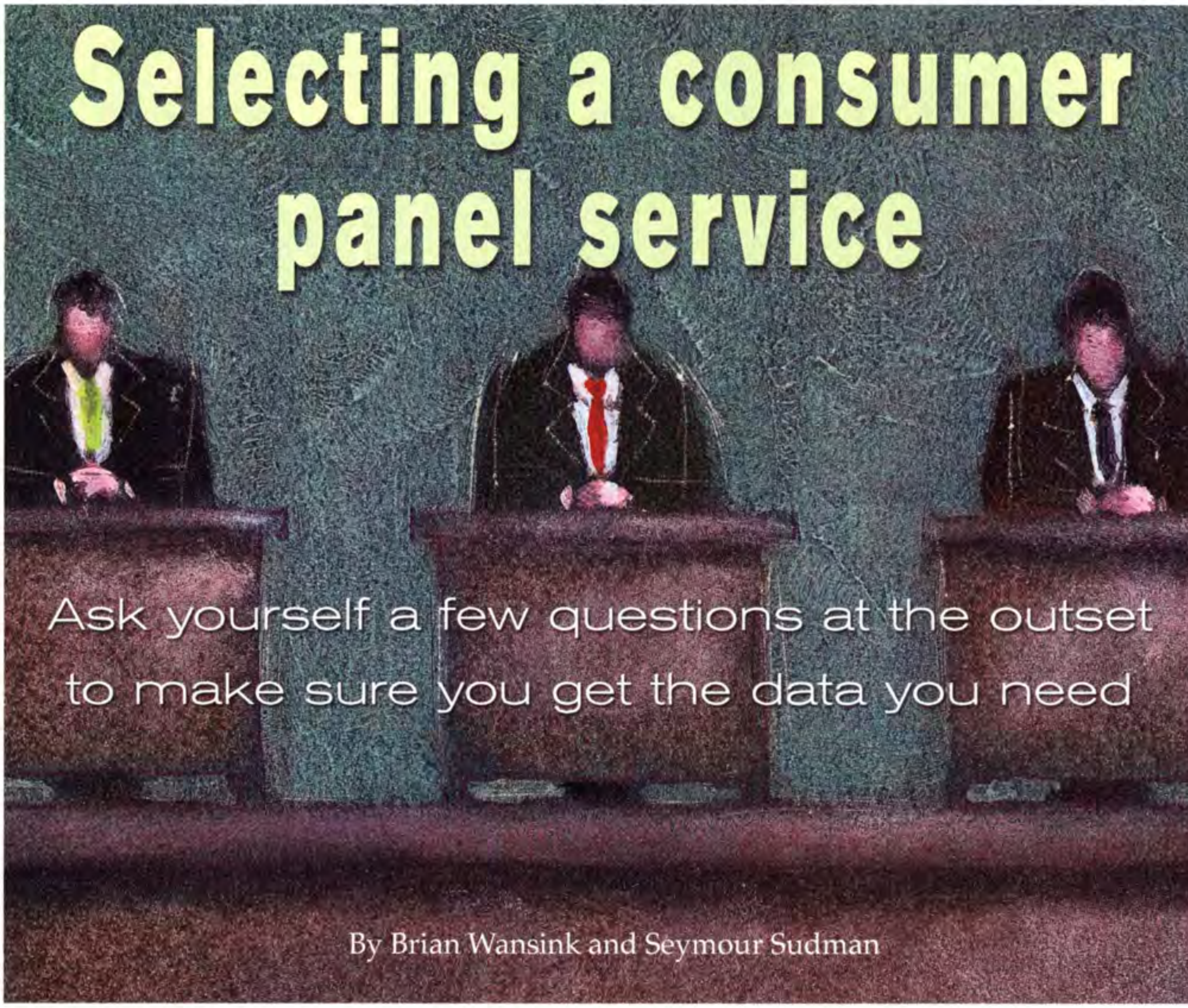
Ultimate remedy

In an effort to maximize diminished budgets while completing reliable research studies, marketers are seeking increasingly innovative research techniques. Looking beyond a typical telephone or Internet-only deployment towards a combined phone/Web methodology, marketers may find the ultimate remedy for difficult fielding studies. By maximizing the cooperation rate (e.g., minimizing refusal rates), researchers can minimize the bias in their studies while improving the reliability of the data collected — benefits enough to consider using a dual-method approach.

Selecting a consumer panel service

Ask yourself a few questions at the outset to make sure you get the data you need

By Brian Wansink and Seymour Sudman



Editor's note: Brian Wansink is professor of marketing, nutritional Science, and agricultural and consumer economics at the University of Illinois at Urbana-Champaign. The late Seymour Sudman was the Stellner Distinguished Chair of Research at the University of Illinois at Urbana-Champaign. This article is based insights gathered during the writing of Consumer Panels *(by Seymour Sudman and Brian Wansink; published by American Marketing Association: Chicago). Wansink can be reached at Wansink@uiuc.edu or at 217-244-0208.*

Given the widespread use of consumer panel techniques in marketing work, nearly every marketing executive or researcher concerned with consumer goods will have to consider at one time or another how to use this technique in their work. Choosing a consumer panel service then becomes of considerable importance, since it is far cheaper to buy into an ongoing consumer panel than to set up a separate panel for one's own use. Although the latter procedure guarantees confidentiality and exclusive control, it also entails large expenditures, as well as the necessity of recruiting a special staff — which very few manufacturers or retailers care to incur.

It therefore seems appropriate to outline the principal factors to keep in mind in selecting a consumer panel service. Moreover, considering such questions as how to determine the most suitable consumer panel for a particular purpose and how to evaluate the relative merits of panels also helps to clarify what is really needed from a panel study.

Eleven tips in choosing a panel service

Although the principal points to consider in selecting a consumer panel service vary to some extent with the type of product and with the problems to be solved, certain basic factors are applicable to all types of panels, including continuous purchase panels, product testing panels, copytesting panels, and others. These factors are brought out in this article in the form of a series of 11 pointers that should be followed in considering a consumer

panel service. It should be noted that all of these pointers relate to the objectives and the technical aspects of the panels, not to the cost. This is because trying to save some out-of-pocket costs and thus running the risk of getting highly unreliable information is a case of being penny-wise and pound-foolish. In using consumer panel information — regardless of whether collected online or offline — the objective should be either to obtain highly reliable and appropriate information for the problem or not to spend any money at all.

1. How could these results possibly change what I would do?

Our training as researchers and as businesspeople has always told us that more data is good. While it is no surprise that data comes at a cost, data is most valuable when it informs a decision. Suppose we are trying to find out how people shop. If the range of possible outcomes of this research will not alter any decision we will make, the research should not be done. Unfortunately, much non-diagnostic research is conducted every day. It usually begins with someone saying, "Wouldn't it be interesting to know..." The problem is that when the resulting crosstabs, bar chart, or pie chart is presented, part of that year's research budget is gone and managers are not any wiser than they were prior to the research.

One way to avoid this is to proactively specify a wide, discrete set of findings or outcomes that could occur if one did the research. For each of these outcomes, write down what the resulting managerial action would be for each outcome. If the managerial actions (or responses) are the same for each of the outcomes, there is no need to do the research. If there is a wide variation of what your managerial response would be, this exercise will probably also suggest additional questions you will want to ask.

2. Choose either static or dynamic panels

Having a panel composed of the same consumer units or individuals throughout a given period makes a static panel especially useful for evaluating the effects of advertising or other stimuli. By providing before-and-after purchase records for the identical panel members, a static panel helps to keep extraneous factors constant and brings out more clearly the effects of any experimental treatments used.

If, however, panel data are wanted to serve as a basis for making generalizations about the market, a dynamic sample is necessary. Such a panel will provide for rotation of the consumer units so that the distribution of its members is kept in line with current shifts in population characteristics. Such a rotation pattern should be on a staggered basis and should allow for estimates to be made for the population based on the composite results of both the old and the new segments of the panel.

In choosing between these two types of panels, it is useful to keep in mind that it is always possible to incorporate a static panel within a dynamic panel, but the reverse is not possible.

3. Don't confuse panel data with one-time survey data

When it comes to one-shot surveys, online versions save time, eliminate interviewer bias, offer better international coordination, provide multimedia capabilities, and can help improve data quality. Pop-up definition boxes and relational navigation links make the survey more understandable for respondents and easier to complete, and versing, skips, rotations, and piping allow for more complex questionnaire design, and enable conjoint and pricing studies to be completed more efficiently.

While these advantages are attractive for one-time surveys, they may not be worth the costs for continuous panels. For certain panels, time saving is not necessarily an issue because they are reported on a regular interval, and the results are seldom urgent, but more long-term in nature. For panels, many of these features may not necessarily be worth the trade-offs that might have to be made relative to sample representativeness or data accuracy. Representativeness was covered above; let us address data accuracy.

The primary objective in panel research is to find consumers who will consistently and accurately complete the entries in their panel diary. Hard-copy diaries are always available (perhaps sitting on a desk) when entries need to be made. If online use is irregular, or if computer and Internet access in the household is a competitive resource, a more convenient form (such as hard-copy panel booklets) might provide more accurate and consistent responses.

For continuous panels, panel members become efficient because the format of the instrument is static and the directions are familiar. The features that make the Internet effective for some types of surveys are less beneficial — and may even detract from a panel's effectiveness. When assessing the necessity of features, it is important to make certain that they are features that will be worth the costs or trade-offs associated with them.

4. Double-check panel representativeness

Be sure that the panel is representative of the particular population to be studied and with regard to the population characteristics that need to be analyzed. To say that a sample is representative of a population without specifying in what respect it is representative is meaningless. What you invariably want is a panel that will yield accurate purchase estimates for each of the consumer characteristics that may affect the sale of the product. Representativeness for one characteristic does not ensure a panel's representativeness for other characteristics. It is therefore important to make sure that the panel is representative with respect to all of the characteristics to be studied.

It is especially important to make sure that the panel is concentrated in the areas among the population groups that are the principal purchasers of the product. Thus, a broadly representative national consumer panel may be wasted for a manufacturer of products that are sold primarily in rural areas. A concentrated panel is likely to be cheaper per dollar expended, and it also permits a more intensive analysis of purchaser characteristics.

It is important to check the representativeness of the reporting sample rather than that of the mailing sample. Consider mail diaries: Since response rates vary by population groups, a perfectly representative stratified distribution of families on the mailing list will not yield a perfectly representative distribution of reporting families. A competently run consumer panel should contain a disproportionately high number of lower-income, poorly-educated families with a low response rate. Remember that the purchase data received will be based on the reporting panel, not on the original mailing list.

Request each panel operator bidding for your patronage to provide the number and type of sample controls used to keep the sample representative and the date of the population estimates on which these controls are based. A progressive panel service will try to keep the sample representative in a great many different ways (if it is a stratified sample), and it will be continually revising its controls to keep them up to date with the changing characteristics of the population. The latter is especially important when large population shifts are taking place. Indeed, this is the only way of maintaining the representativeness of a dynamic panel.

5. Double-check data reliability

Inquire into what the panel service is doing to determine the reasons for not reporting and to assure the accuracy of the purchase reports of its members.

Both of these points are important potential sources of bias, and they require continual checks. No panel is perfect in these respects, and none ever will be. But a progressive organization will do continuous studies and check-ups on these points and should be able to show concrete evidence of this work.

A progressive panel operation will also be conducting research and making tests on methods of increasing the accuracy of the purchase reports. Low accuracy of reports is perhaps the major problem of continuous purchase panels, and it is a problem that characterizes even families who are initially fully cooperative. Hence, continual checks need to be made on the accuracy of the reports and on what biases are occurring as a result. If possible, have the panel services submit per-family or per-capita sample purchase figures of products that are related to your own and whose sales can be checked independently. Without divulging these figures, ask your researchers to prepare comparable purchase estimates from the production and/or sales records of these products. Then compare the two sets of estimates. The more reliable your estimates, and the closer these related products resemble your own, the more accurate this procedure is in indicating the relative accuracy of the competing panel services in your case. Needless to say, a similar comparison may be made if any of the panel services have past records on the consumer purchases of your own product.

Keep in mind also that if the primary interest is in measuring the flow of a product from the warehouse to the consumer, a store or warehouse inventory panel may be preferable to a consumer purchase panel. For food and drug products, for example, a statistically valid panel of food and drug stores is likely to yield a more accurate picture of purchase flows than a consumer panel. However, if the primary interest is in correlating changes in purchases with the characteristics of the purchasers of the product, a consumer purchase panel is clearly indicated.

6. Pay only for the precision you need

Precision can come in two forms. One is multiple questions asked in multiple ways that triangulate on the same construct (i.e., using a Likert scale, a semantic differential scale, and an estimated purchase frequency question to measure purchase intentions). The second form of precision is obtained by getting a larger and larger sample, thereby reducing sampling error. The entire concept of sampling is based upon the notion that it is infeasible and unnecessary to survey an entire population. So too is there a point at which a sample size is large enough to effectively answer the questions for which it is intended.

While precision is good, after some point there is less and less value to being more and more precise. The cost of asking multiple questions for every construct of interest can be measured in a lower response rate and higher error due to fatigue. On the back end, this cost can be measured in increased data handling and increased analysis and reporting.

To ask something because it "might be interesting" is expensive. The more diagnostic the questions, the better and the greater the need for precision. One rule of thumb is to ask how much the outcome in a measure would have to change before it would change a decision. If a change from 4.0 to 3.9 would result in a product being launched, or an old product being dropped, there is a high need for precision. That is, a large sample size and multiple questions are necessary. If, on the other hand, the change from an estimate of 4.0 to 2.5 would still not change a decision, the sample need not be as large and multiple questions might be trimmed.

7. If accuracy is critical, measure sample error

Determine whether you want sample data that will permit you to measure the sampling error. In most cases, estimates of the sampling errors in the purchase data are extremely desirable. Without such estimates there is no way of knowing to what extent sampling variations may have introduced errors in the purchase figures. Unfortunately, such error estimates are not possible with some continuing consumer panels because their members are not selected in the true random fashion that is the basic prerequisite for the applicability of sampling error formulas.

A knowledge of the sampling error is not so important for some purposes as for others. Thus, in general a knowledge of the sampling errors is not so necessary in studying trends as in "blowing up" the sample data to population estimates. However, even in the former case, much greater reliability can be placed in a panel whose sampling error is measurable.

Further, if a panel is selected whose sampling error can be measured, be sure that the panel will yield results within the required sampling error limits for strata and substrata as well as for the total sample. As a rule, a major requirement is to have a sample that yields acceptable error limits at the smallest levels of aggregation. The specification of strata and substrata, as well as acceptable sampling error limits for these entities, are frequently the critical considerations for sample size. It makes a huge difference, for example, whether a sampling error of five percentage points at the 95 percent confidence level is desired separately for each of four different income levels and three different age groups or whether the same sampling error is desired for the combinations of income level by age. In the latter instance, minimum adequate sample sizes have to be considered for each of 12 income-by-age strata, which would require a sample many times larger than that needed for minimum sampling errors for income and age strata separately.

This also means that one should not ask for a lower sampling error than is absolutely needed, since generally the lower the sampling error, the higher the sample size and the higher the cost of the service.

8. Think sample reliability, not sample size

Don't rely on sample size alone as a determinant of the reliability of the results. Other important considerations are the sampling method used to set up the panel, how the individual panel members are selected, and how the data are collected. The sampling method is particularly important. A small randomly-selected sample is likely to be far more reliable than a much larger arbitrarily-selected sample.

The principal determinant of the reliability of the sample data is not the sampling variance but the mean square error. As a rule the bias component of the mean square error tends to be many times that of the sampling variance in consumer purchase studies, so that primary attention has to be given to the nature and magnitude of the nonsampling errors inherent in the panel operation. Therefore, it is important for a panel operation to make constant checks on the accuracy of the purchase reports and on other sources of nonsampling error.

9. Stratum sample size is more important than general sample sizes

Be sure that the panel is large enough to supply reliable purchase figures for each of the breakdowns required. Not only must the panel service be able and willing to supply the necessary breakdowns, but there must also be a sufficiently large number of members in each stratum and substratum for which figures are desired. Exactly what constitutes a sufficient number depends primarily on the popularity of the product: the less widely purchased it is, the larger the number of sample members required in a particular substratum to yield a cross-section of the characteristics of its purchasers.

Generally, it would be wise to insist on at least 25 panel members in each stratum for which purchase data are requested, although at times this figure may be much too low. For example, if only 3 percent of the families in a certain city purchase Product X, a panel substratum of 25 to 30 members in that city may easily contain not a single purchaser of the product.

10. Sorting out the offline vs. online decision

For some situations and some questions, offline panels are the obvious choice. For other types of questions, online panels are obvious. The difficulty lies in the gray areas. Each method has its benefits and each has its self-selection biases. The crucial concern with an online panel is that it is presently the least favorable choice for research in terms of accuracy, according to Karl Irons, president of NPD Online Research.

Online panels can have some tremendous benefits when the population is accurately sampled. Online panels are fast, they can generate large samples, they can be inexpensive (no mailing and printing costs and lower labor costs), they can show graphics and video, and they can provide seamless international coordination. Furthermore, they can reduce in-house errors associated with interviewer bias or coding and data entry errors.

Despite these benefits, there are concerns that Internet-savvy consumers are not representative of the general population. While no method offline or online is perfectly representative of the population being studied, there is a sizable concern that online panels are psychographically biased toward progressive technology innovators, and demographically biased toward young male professionals. If this is true, then the typical grocery shopper is probably represented more accurately by offline panels then online panels. In this case, the decision of which type of panel to use to study grocery shopping would involve a trade-off: the speed and savings of online or the increased accuracy of an offline panel. For certain questions, accuracy is less important than others.

Yet the representativeness of online

panels to the general population of consumers is only important if you are actually interested in the general population of consumers. There are situations where the population of interest — for instance, people who purchase on the Internet — is best captured by an online panel. Presently, items that can easily be bought using the Internet (books, compact discs, airline tickets, magazine subscriptions, home banking, investment services, and software, etc.) are probably good candidates for online consumer panels.

Furthermore, there are subgroups within the population that may be better represented through Internet than through other methods. Teenagers, for instance, have been an elusive group with respect to consumer panels prior to online consumer panels. This is also true for consumers who are single and for well-educated audiences, such as doctors, lawyers, and other professionals, and it may also be true for working mothers.

In summary, the online vs. offline decision depends on the products and the populations you are studying and on the level of accuracy that you need. As Internet use increases, biases will decrease, and online panels will be better able to access a more general population.

11. Don't ask for more data than you need

The more data you request, the more you pay — not only for the panel data but also for the time your researchers spend in analyzing and cross-analyzing the figures. In the long run, it pays to concentrate on those consumer characteristics that affect the sales of your product most strongly. To accomplish this, try to obtain purchase reports for your product by as many different characteristics as possible the first few times. By analyzing these reports, you can determine which characteristics have the least influence on the purchases of the product and so could be dropped from future reports — except, perhaps, for occasional checks, if desired. The savings resulting from this procedure could be spent on obtaining more intensive breakdowns of relevant characteristics. For example, if the purchases of Product X vary greatly by region and by city size but not by income or occupation, the two latter classifications might be dropped, and a larger number of region and city size breakdowns could be requested, either a finer breakdown of regions and city sizes or a breakdown of purchases by city size within regions.

It is especially desirable to keep the number of printouts requested to a minimum, since they can multiply astronomically when comparisons are being made not only by population characteristics but also over time. Unless the office is in danger of being blown away by a tornado, it is wise initially to ask for printouts on a very selective basis, since the sheer volume that can be turned out by a computer in the batch mode is enough to discourage even the hardiest of researchers from plowing through them. For exploratory purposes a highly efficient (although not the cheapest) means of selecting relevant characteristics and key tabulations is to have the panel data online and to produce alternative frequency counts and tabulations interactively using a computer. Many forms of multivariate and more sophisticated analyses can also be carried out in this manner, and numerous alternatives can thereby be sifted out without having the office take on the semblance of a paper warehouse.

Summary

It should be clear from the foregoing that the best panel service is not necessarily the cheapest one. To save a few dollars at the expense of reliability may jeopardize the value of the entire operation. Most important of all is obtaining the greatest reliability for your dollars. If you subscribe to the panel service that can give this to you, any additional expenditure for that service will be well worth the cost.

QuickLink

To see how BASES built an online panel, visit www.quirks.com and enter Article QuickLink number 502. Article QuickLink number 260 shows how Maxfli used a telephone panel in developing a new line of golf balls.

Objectives are carved in stone, but clients always have chisels

The 10 rules of marketing research

By Tim Huberty

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I have been involved in the marketing research industry for over two decades. During that time, I have conducted hundreds of studies for countless clients. I have also taught in an MBA program for 15 years. Oftentimes, during a presentation or lecture, I will make a "big picture" statement, one not totally supported by the data or related to the topic. When challenged, I simply say, "It's just one of the 10 rules of marketing research." As you might imagine, over time, clients and students have become increasingly vocal about learning what those rules are. When asked where they can find them, I can only hem and haw and promise to "get them a copy." Eventually, one has to make good on all promises. So here goes.

1. People can be stupid. And they also lie. Newspaperman H.L. Mencken once wrote that nobody ever went broke underestimating the intelligence of the American people. Until I read that quote, I had no idea that Mr. Mencken was also a marketing researcher.

Art Shulman has documented this rule for many years in this magazine. What researcher out there doesn't have his or her favorite War Stories of respondent stupidity? My own examples? I remember moderating a focus group a few years ago when a respondent really, actually, truly wanted to know if Alfredo Fettuccini was an Italian tennis player. Or there was the person in a more recent focus group who asked if distilled water and distilled liquor are the same thing. In fact, over this past weekend, I was supervising a group of students who were conducting telephone interviews. More than one reported a new "ethnic background": Norwegian.

We all know that people lie. When conducting focus groups, I make participants first write down their reactions, whether or not they are reviewing an ad or responding to a group question. Over time, I have discovered that at least one-third of all participants change their answers — even after writ-

ing them down. When challenged on this, respondents will often accuse me of misreading the number they have written. Or they will claim that they didn't understand the scale. Or, in a throwback to political incorrectness, will point out that, "It's a woman's prerogative to change her mind."

2. People's opinions count only to the extent that they agree with those of the people in the back room. It's amazing how smart — or stupid (or good-looking or ugly) — focus group participants are to back room observers if they happen to agree with what is being presented. Eliciting positive reactions to a storyboard can make the difference between a "good" recruit and a "bad" recruit. It can make the difference between "he's not one of the sheep" and "he sleeps with the sheep."

More often than not, when I come into the back room while conducting focus groups, clients instruct me which participants to "concentrate" on. "Those other ones [i.e., the ones who aren't saying what they want to hear] aren't worth crap."

I sometimes invite clients to listen in on interviews as the data is being collected. After one session, a client asked me why I wasn't interviewing any of his "smart customers." (I guess they were busy talking to his "smart competitors.")

3. Selecting focus group locations has absolutely nothing to do with the product. I discovered long ago that focus groups are only conducted in cities in which clients have relatives. Or old college friends or former associates. Or "big weekends" planned. Forget BDIs. Or CDIs. Or "market strength." Or "a strong distributor network." Ultimately, it all boils down to who the client knows where. Or what is going on the preceding or following weekend. One of my clients demands to do focus groups in the New York City area because his son goes to school there. Another client likes Chicago during the summer because of the Lakefront Jazz Festival. Still another client likes L.A. because she and her husband can "play" the weekend before or after the groups are conducted.

4. The bigger the building, the higher the price. Overhead means overpriced. Essentially, the data collection interviewers are all getting paid the same wage. Thus, the mark-up has to go somewhere. Like for rent. Thus, the corollary to this rule would be: The more people the supplier employs, the more the project will cost. Last fall, I was able to win a customer satisfaction study from a client because the previous supplier was already charging 63 percent more than I had bid. Of course, that research company not only had its own building, but also had an "international reputation" (their interviews called from Canada). Caution: You don't want to bid too low because then clients suspect that they will get what they pay for. Interestingly, to my knowledge, that axiom has never been proven.

To be fair, there are ways of "justifying" the higher cost. For example, just mentioning the presence of a Ph.D. in the proposal is worth at least another 20 percent mark-up. (Usually, those eggheads seldom even see the data, but are listed as part of the "statistical team.") Also, research on "the coasts" — whether it be quantitative or qualitative — is always more expensive. I've never been able to figure that one out.

5. Somehow, during the first meeting, always ask the client what he expects the results will be. This will save you a whole lot of time — and heartache — later.

Most clients know what they are looking for before they start. In fact, they expect you to prove what they are looking for before you start. Any researcher with more than a month's worth of experience can tell you about all the wasted time which was spent doing objective (i.e., clueless) analysis. Furthermore, if you're smart enough to figure out what they're expecting, you'll benefit from a long-term relationship. If not, you'll hear "We're not doing any research at this time" whenever you call looking for business.

I've learned this lesson the hard way. A few years ago, I worked with a government agency which was convinced of the need for a technology center in an out-state area. Unfortunately for me, respondents thought this was the stupidest idea they had ever heard of. Consequently, that study got buried.

Another example concerned a client that had expanded into the Kansas City market. They hired me to conduct focus groups to find out what local residents thought about them. The answer was "not much" and my report said so. The client's reaction was not atypical: "Focus groups are worthless. It's only a few a———s shooting their mouths off."

And speaking of clients, always remember that, "Objectives are carved in stone, but clients always have chisels." A project always begins with a proposal, in which the objectives are defined in no uncertain terms. In fact, I end each client launch with a "final" confirmation by stating, "So tell me what it will take for this project to be a success." Or, "This project will be a complete waste of time and money unless you get...."

Despite my efforts, I'm always amazed at how objectives "evolve." I cannot recall many presentations during which a client has not asked, "Why didn't you ask that?" Or, "Who came up with that idea?"

Actually, this leads me to place the "other perspective" on Rule No. 1: "If you think respondents are stupid and they lie, just wait until you present the results to management."

6. Budget determines sample size. One question students always ask is, "What's a 'good' sample size?" They're really asking the wrong question. The first question you immediately ask the first time the phone rings is, "How much money do you have?" That becomes the figure that goes into the proposal. That's the figure that will determine how much you will actually make on a project.

Clients always have more money. Incidence lower than expected? There's a stash of cash somewhere. Sample too small to realistically analyze subgroups? Doesn't matter. There's always more money in the kitty. In fact, a rule of thumb is to double whatever a client claims he or she has to spend.

Two months ago, I wrote a questionnaire to reflect the topics that each member of the team had to have addressed. Unfortunately, this expanded the seven-minute interview to 18 minutes. No problem. The money mysteriously appeared out of the "this is absolutely all we have to spend" budget. Nonprofits are notorious for getting their hands on more money. They've always got some funds squirreled away somewhere.

Finally, the following rule works especially well when estimating your original budget: always bid low. This is an extremely crucial rule when bidding on government work, which is oftentimes awarded to "the lowest bidder." Once you've won the project (and their hearts), let the "add-ons" begin!

7. *If you torture a number long enough, it will come around for you.* I learned this one years ago from a guy who had a Ph.D. in statistics. Want to "prove" statistically significant differences — like between those who have seen the advertising vs. those who have not? Just lower that confidence level to 90 percent, 85 percent — or even 80 percent. One copytesting service I know actually does this. They just don't mention it on individual tables — just in the appendix (that graveyard of report minutiae). An industrial client actually instructed me to lower the confidence level so that there were more statistically significant differences between groups. She told me, "If we don't come up with a lot of statistical differences, management will feel they haven't gotten value for their money."

Results aren't what you'd like them to be? Just keep running the numbers. There's no reason to be hampered by an "unfriendly number." A truly creative (or experienced) researcher will realize that there's always a subsample somewhere which needs to be "re-analyzed." Of course, moderators aren't encumbered at all when reporting the results of qualitative research. No matter how many said what, there's always an opportunity to downgrade a unanimous opinion with "most, but not all, said." This also works the other way — when participants trash an ad, the research spinmeister points out that "a few participants were really enthusiastic about this ad..."

8. *When presenting research results, always use the latest buzzwords.* That way, not only will you sound like you're "with it," but the client will recognize that his own project is "cutting-edge." And that he's found a research "partner" who "truly understands the marketplace." Some of the current "must" words include "return on quality," and "plethora" (and especially its cousin, "veritable plethora"). And for some reason, clients are always really impressed if you can throw in the word "passion."

At the same time, all seasoned researchers have learned how important it is to use the "standard research vocabulary." They know the importance of using really big words to describe really abstract concepts. After all, the bigger the word or the more abstract the concept, the less likely it is that the audience will ask about it. They don't want to sound stupid. More importantly, the audience won't try to figure out what you're talking about. They'll just realize that they're getting their money's worth and keep quiet. Who cares if the researcher has no clothes?

Ultimately, however, any researcher worth anything will invoke the patron saint of marketing research, Fred Astaire. They've learned to dance. They've learned to communicate the message "I have absolutely no idea what you're talking about" by saying "That's a very relevant point. I'll have to conduct some further data runs."

9. *The better the results, the smarter you are.* This one's for those readers who missed Rule No. 5. Brilliance in marketing research is only defined by how positive is the information you're providing. (And believe me, brilliance is a fleeting commodity.) Presenting "good" results just adds a cheeriness to the entire room. It allows your immediate client to show her boss how brilliant she is for selecting you to do the project in the first place.

This also ties into the sub-rule "The better the results, the more they'll like you." Or ultimately, "The better the results, the more likely the client is to invite you to do more work." Several of my peers are "locked into" advertising agency work because they always — just coincidentally — seem to deliver results which demonstrate how "on-strategy" the campaign (and agency) is.

Another sub-rule: "Really good research confirms what the client already knows." Many years ago, I conducted focus groups for a consumer goods manufacturer. Eight groups in four days (the "cross-country road trip"). When I was presenting the results, the client actually praised me for "being perceptive," and for "being as smart as I am."

A good researcher will acquire the gift of stating the obvious. If you tell a client what he or she already knows, it merely proves that you understand their business. This also adds immeasurably to your own credibility.

10. Last, but not least: Recommend more research. A truly good researcher will always be on the lookout for that next study. (After all, we have to eat! Or pay for that car. Or, at least, pay the rent on that big building.) What piece of research doesn't lead to the opportunity to again prove how brilliant you are?

However, seasoned researchers have to understand that it shows a complete lack of class (and gives the profession a bad name) by just blatantly recommending further research. Instead, the researcher will soften his overtures by enthusiastically stating, "Now, if this were my business, here's what I'd do." Or, "I know budgets are really tight right now, but to get maximum return on your investment, you should do this." It's called "upselling." It's done in the fast-food industry all the time. One independent researcher once shared a "consulting secret" with me: "In order to be in business, you only need three clients. And then milk them for all they're worth."

Rules to live by

So, those are the rules that I've come to live by. I suppose some are tongue-in-cheek, but not many. The fact is, all of the anecdotes are absolutely true. I must confess that my MBA students did help me in putting together this list. That's because, unlike veteran marketing researchers, they're not so close to the industry as to overlook the obvious. Also, using many of the students' suggestions has also allowed me to take advantage of the First Rule of Marketing: "If it's worth anything, it's worth stealing."

QuickLink

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COMPETITIVE STRATEGY:

UNDERSTANDING HOW CUSTOMERS RESPOND TO PRODUCT CHANGES

By Tim Glowa, Sean Lawson and Julien Lambert

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The theory of business strategy stems from the need of managers to be able to counter the effects of external market forces. Without the tools needed to support it, firms may fall back on crisis management in reaction to unforeseen market forces.

One of the foremost authorities on competitive strategy is Michael Porter, a professor of business at Harvard University. Porter argues that the "essence of strategy formulation is coping with competition."[1] Competition in an industry comes not simply from direct competitors, but from the underlying economics of the industry itself. In his book *Competitive Strategy: Techniques for Analyzing Industries and Competitors*, Porter identifies several major antecedents governing the development of a competitive strategy. He believes that businesses should search for new, sustainable, competitive advantages. These advantages come from developing a distinctive way of competing. An advantage comes from either having consistently lower costs than rivals, or by differentiating a product or service from competitors [2].

Consumers choose which products or services to purchase. In making these purchasing choices, consumers evaluate the product features as well as the brand and price charged. Simple economic theory holds that consumers are utility maximizers, meaning they will select the product that has the highest overall utility from a competing set of product offerings, each constructed with dif-

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ferent utilities for the product components. Features in a product offering that customers like are unconsciously assigned higher utility values, while features consumers do not like (such as price) are assigned negative utility scores.

Understanding the behavioral responses of consumers to the actions of businesses and governments is of interest to a wide spectrum of firms. Consider the example of a consumer choosing a credit card. In evaluating which credit card to select, the consumer might narrow the selection down to the two products shown in Table 1.

Table 1: Deciding upon competing credit cards

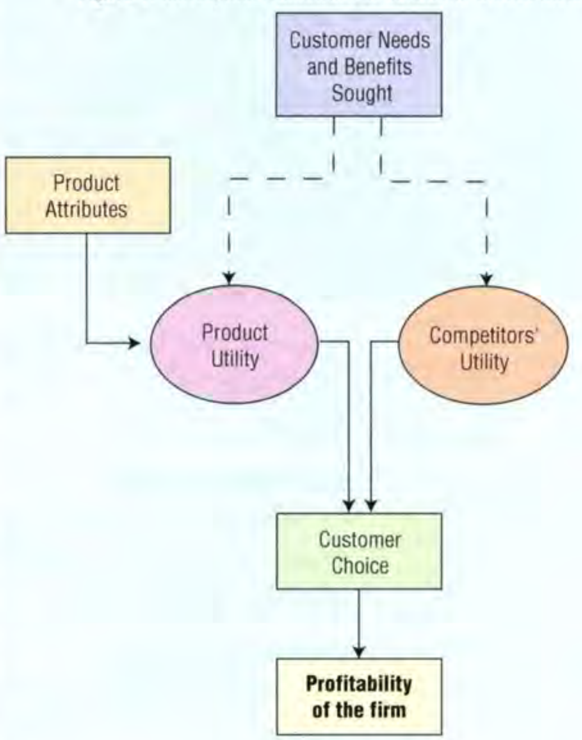
	Bank of America	Wells Fargo
Annual fee	$30	$50
Card limit	$2,000	$4,000
Rewards	None	Air Miles/Travel points
Interest rate	16.99%	19.99%

A rational consumer in the market for a credit card, faced with the final two options in Table 1, will evaluate the competitors and base a decision on what is best for them (which option provides the highest overall utility). Through evaluating each product, every consumer is unconsciously influenced by his or her own decision-making criteria.

For example, one consumer, who uses the card for business purposes only, and pays the bill every month, may not be as concerned with interest rates, and more concerned with rewards, brand name, and credit limit. As such, these components will affect his or her decision more heavily than the interest rate, for example. On the other hand, a consumer who uses the card infrequently but often carries a balance each month, may be more concerned with the interest rate, and be more price-sensitive. This consumer may attach more utility to price variables than to rewards or credit limit.

Each consumer is unique; they use their decision-making criteria to choose between competing product offerings. It is also impossible for most consumers to define their own decision-making criteria; when asked, most are unable to quantify how or why they select one product over another, other than simply stating that the product is fulfilling a need. However, it is possible to understand how groups or segments of consumers will likely respond to competitive product offerings, and therefore uncover how much importance they assign to each of the product features.

Figure 1: Conceptual Framework of Consumer Choice Behavior



Individuals' choices are influenced by habit, inertia, experience, advertising, peer pressure, environmental constraints, opinion, etc. This set of influences reflects the temporal nature of choice outcomes and segments with the choice constraint itself[3].

Therefore, it is important, in defining a competitive strategy, to consider and understand consumer behavior, and specifically, how customers will respond to your product offering. One tool that marketers can use to understand consumer behavior is discrete choice modeling.

Discrete choice modeling

Discrete choice modeling, the 2000 Nobel Prize-winning mathematical analysis theory, is based on a rigorous and well-tested theory of consumer choice behavior, known as random utility theory. As shown in Figure 1, this theory postulates that the consumer attributes utility (a latent measure of preference) to each product in the marketplace in accordance with the product's attributes and the perceptions of the extent to which each brand meets their needs and benefits. The customer's objective, consistent with economic theory, is hypothesized to be the maximization of utility. Thus, the product that is "best" for them is selected, subject to what they know about competing options and whatever constraints (i.e., income, product delivery) are operating on their choices[4].

Specifically, discrete choice models can be used to understand:

- market strategy development;
- new product design;
- market share, profitability or margin optimization;
- branding issues (brand equity, co-branding, affinity branding);
- customer retention and profitability.

The functional power of predictive modeling is illustrated in the example below.

An illustration of discrete choice modeling

Within a competitive arena, firms are struggling against one another to maximize revenues. Consumers make or break a product through their decisions on whether or not to purchase. A choice model can be used to examine the effect on market share of introducing a product change. The change in product, implemented by any competitor included in the model, can be used to optimize a competitive offering, or to measure the effect on market share as a result of a product change from a competitor.

For example, assume the simple credit example investigated earlier was part of a larger study that included four key competitors in a targeted market (obviously a real model could include more competitors and more product variables). Their initial product offerings and corresponding market shares are illustrated in Table 2.

For example, suppose that Citibank, realizing that it has less market share, is considering lowering its interest rate in an attempt to

Table 2: Initial market shares

	Bank of America	Wells Fargo	Citibank	MBNA
Annual fee	$30	$50	$40	None
Card limit	$2,000	$4,000	$4,000	$1,000
Rewards	None	Air Miles/Travel points	Yes, 2% cash back	None
Interest rate	16.99%	19.99%	21.99%	14.99%
Market share	30%	22%	12%	36%

Table 3: Citibank lowers interest rates

	Bank of America	Wells Fargo	Citibank	MBNA
Annual fee	$30	$50	$40	None
Card limit	$2,000	$4,000	$4,000	$1,000
Rewards	None	Air Miles/Travel points	Yes, 2% cash back	None
Interest rate	16.99%	19.99%	17.99%	14.99%
Market share	27%	20%	20%	33%

capture more market share. Using discrete choice modeling, analysts at Citibank can quickly identify how the market will respond to lower interest rates. Consider the change from 21.99 percent to 17.99 percent and the corresponding change in market share as illustrated in Table 3.

Table 4: Bank of America retaliates and lowers interest rates and annual fee

	Bank of America	Wells Fargo	Citibank	MBNA
Annual fee	$20	$50	$40	None
Card limit	$2,000	$4,000	$4,000	$1,000
Rewards	None	Air Miles/Travel points	Yes, 2% cash back	None
Interest rate	14.99%	19.99%	17.99%	14.99%
Market share	39%	17%	15%	29%

The model predicts that such a change would increase market share for Citibank by eight percentage points, while decreasing the market share for the other competitors in an industry.

However, product changes, such as in this example, are not made in isolation. For this information to have strategic and tactical value, additional analytical powers are needed. This is where discrete choice modeling becomes highly valuable. For example, consider that the Bank of America decides that it is not willing to wait and watch its customers migrate to another institution. It decides to lower both the interest rate and the annual fee for its credit card. This change is reflected in Table 4. The market shares for Bank of America have gone up, effectively taking market share away from competitors.

Market strategy development

This type of tool is invaluable for decision makers within these firms. Not only can an optimal product offering be quickly identified, a firm can also determine how best to respond to a competitive change. For example, when Citibank lowered interest rates, other competitors, if they had such a tool, could quickly determine the consequences on market share of this change within the industry. This information could be used to define an optimal competitive reaction; how should MBNA respond, for example? Should it lower interest rates further, or ignore the threat altogether?

Additionally, a firm using this tool cannot only define the optimal product for itself, it can also measure and examine possible consequences of having a competitor react to these changes.

The functionality of the model also applies to new product development. For example, suppose Wells Fargo is deciding on issuing all credit cards with a photo of the user imprinted on the back. Wells Fargo could use this type of modeling to determine not

This type of tool is invaluable for decision makers within these firms. Not only can an optimal product offering be quickly identified, a firm can also determine how best to respond to a competitive change.

only if customers are interested in such a feature but if they are willing to pay more for the additional security it offers (and if so, how much more) and where the bank will be positioned should competitors copy similar measures. By understanding how much customers are willing to pay for such a product feature (if they are willing to pay anything at all), Wells Fargo can conduct a cost/benefit analysis to determine whether the costs associated with developing the new product (including receiving and scanning customer photos, etc.) is worthwhile.

It is important to realize that not every customer will have the same sensitivities. Some will be more price-sensitive than others. Some target markets will respond differently to various product offerings. Therefore, it is important to include a segmentation measurement with discrete choice models for the ability to define the optimal strategy by targeted segment, or measure the sensitivity differences across segments.

Lastly, by fundamentally understanding what drives a customer to purchase (is it price? is it brand? is it loyalty programs?) a firm can incorporate these latent measures into its marketing communications strategy to ensure the message gets into the marketplace. In a sense, this is like truly understanding what the hot buttons are for each customer segment.

Include a range

In developing a discrete choice model, it is important to include a range of variables that will be relevant to the strategy investigation at hand. Once a model is created, it is not possible to go back and include additional variables without developing an entirely new model.

On the other hand, discrete choice modeling allows a firm to quickly identify the optimal product strategy. Rather than simply introducing a product change, and waiting weeks or months to measure its effectiveness, an analyst can quickly identify the appropriate strategy using this powerful model. This shortens the time to market and can effectively eliminate strategic product errors.

Firms can use the powerful tool of discrete choice modeling to maximize their competitive advantage. If a new competitor is entering the market, firms can proactively identify not only the potential loss in revenue this entrant might cause, but also identify and develop the appropriate response to protect market share. Firms can also leverage their brand and optimize their product offerings in the most efficient manner possible.

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QuickLink

Visit www.quirks.com and enter Article QuickLink number 86 to access Steven Struhl's in-depth look at discrete choice modeling. Enter number 592 to read Tim Glowa and Sean Lawson's comparison of discrete choice and conjoint analysis.

Especially for you

Chicken nuggets on a bun and other twists on mass customization

By Kunal Gupta

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When I go to a fast-food restaurant, I like to order chicken nuggets...but I order them on a bun. You've never seen such confusion! I throw the entire operation into a tailspin. This is because fast-food service, by definition, does not easily allow for made-to-order requests.

After much study, however, I would argue that mass customization — providing customers with anything they want, anywhere they want it, any way they want it, and doing it profitably — can happen in the service sector and can happen successfully. I am going to outline how you can get fries with your shake and eat them too...even if you ask for them on a bun.

The concept of customization is not new. Many years ago, the family tailor or the cobbler down the street produced clothing and shoes to fit the preferences of each customer. Over the years, the economy expanded and the distance between the manufacturer and the customer increased. Today, while the concept of customization is identical to what it was years ago, the challenge is mass producing such customized products. Eyeglasses, computers, bicycles, electronics, and other manufactured products are customized to buyers' preferences, and manufacturers are rewarded with satisfied and loyal customers. The smartest of these manufacturers have mass-produced such customized products and offered them to customers at near regular prices. Such companies have built measuring and manufacturing systems as well as operational competencies that allow quick production of

individualized products. The challenge is to translate this idea to the service sector in a profitable manner.

We're starting to see key examples of mass customization in the hospitality industry, with hotels and car rental companies. Frequent traveler preferences are managed and customized service provided instantly and seamlessly through sophisticated operations. Wyndham Hotels, for instance, now offer to customize rooms for individual guests.

The benefits of mass-customized services are legion. Many see the service sector as the key to reviving the flagging American Customer Satisfaction Index (as measured by the University of Michigan, American Society for Quality, and the CFI group). Recent arguments say the inability to customize service offerings has eroded service perceptions. For companies wanting to benefit from one-on-one customer relationships and avoid constant switching costs, this could be the answer.

Pursuing mass customization in the service industry requires an honest and detailed internal assessment. Crucial questions must be addressed before making the very real commitment to go down that road. The following steps outline a process to determine if mass customization is the answer to your service quality needs.

Step 1: Market research, of course

Do your customers want customized services and are they willing to pay more for them, if necessary? This is a critical point to consider. Well-planned market research is the best bet for determining consumer preferences. Such market research can be conducted both overtly and covertly. Overt research should attempt to gauge the difference between the choices available in the market and those required by the customers in the marketplace. If current offerings in an industry are unable to cater to customer requirements, conditions are ideal to offer customization.

In covert research, the efficacy of customization could be measured by test-marketing customized services to select customers. Such customization could include individualized greetings and/or customized offerings during the overall service experience. More favorable perceptions of quality and satisfaction among the test market customers vis-à-vis the control group could indicate the need for customized offerings. Covert research might be especially applicable in the service sector, where the intangible and experiential nature of the offering makes it hard for customers to articulate their preferences.

Once you determine your customers want customized service, you must continue research to focus on attracting the right clientele — people who want customization and might be willing to pay for it.

Step 2: Making it work is work

Are your customers willing to work a little to reap the benefits of a customized service? You must determine whether they will complete the lengthy survey, divulge personal information and preferences and perhaps spend more money for the convenience of customization. For example, a businesswoman traveling alone may want to fill out a detailed survey to ensure that she is always given a room near the lobby, or away from end corridors. Other businesswomen, for those same security reasons, may not want to share that information. In addition, a growing number of customers don't like to share personal information. It's a sensitivity issue you must recognize.

Even if preferences can easily be obtained, it is important to understand they are not static. Customers who always want orange juice for breakfast may get a craving for coffee or cocoa. Allow flexibility in your survey and in your delivery of mass customized services.

Step 3: First is best

As with many endeavors, there is a huge advantage to being first in the category. If your company considers mass customization an option, be the first to offer it. Being first should not be interpreted as acting in haste. Rather, pursue being first with prudence; it can be a potent and distinguishing business strategy. The advantages of being the first to offer customized services can be both market-driven and operational. From a marketing perspective, such a strategy makes the customer feel like an individual instead of a number, and such perceptions earn customer loyalty. From an operational perspective, building in-firm competencies to offer customization requires seamless integration among departments of the organization. Being the first to develop and improve upon such expertise leaves competitors playing catch-up.

Step 4: It's all in the delivery

Think through the organization's capabilities and resources. One of the biggest challenges specific to service providers is reconciling customization with reliability. Service reliability requires well-planned systems, processes, and scripts to avoid service failures. Service customization requires latitude in systems, processes, and scripts. For example, if a hotel customizes the room according to guest preferences, slow room turnaround could increase customer waiting times, and the operational requirements of customization could add to costs. Likewise, customizing each fast-food item could cause the core quality of the standard product to vary, and also make the operations less efficient by introducing variability in processes otherwise standardized. Customers don't want customized service offerings that impact service reliability and costs. Reliability and customization must be reconciled to minimize deleterious marketing and operational effects.

Reliability always has been important to service customers because of the intangibility and variability that characterize most service transactions. These characteristics introduce uncertainty and perceived risk about forthcoming service transactions, and reliability helps quell customer fears. The customization journey, therefore, should begin only after the service provider can offer reliability. The best approach is to offer increasing levels of divergence and choice, each reliably. Start by offering divergence in areas that can be most easily managed, and gradually move toward divergence in other service areas. This stepwise approach ensures that divergence does not become chaotic and unmanageable. A good strategy is to start offering more variants of tangible components to customers. For example, a hotel company could offer greater variety of in-room supplies, choice of rooms, and food and beverage items. While this seemingly is simply offering variety, it is the first step in the pursuit of customization.

It's also important to remember that employees are key at this stage. Delivering customized services ultimately rests with them. Make sure you have strong employee relationships, union relationships, if applicable, and the teams to deliver the customized services. Make sure employees are willing and able to customize social interaction with customers. For example, have employees address customers by name; this takes the firm closer to customization by offering personalization over and above variety in tangible offerings.

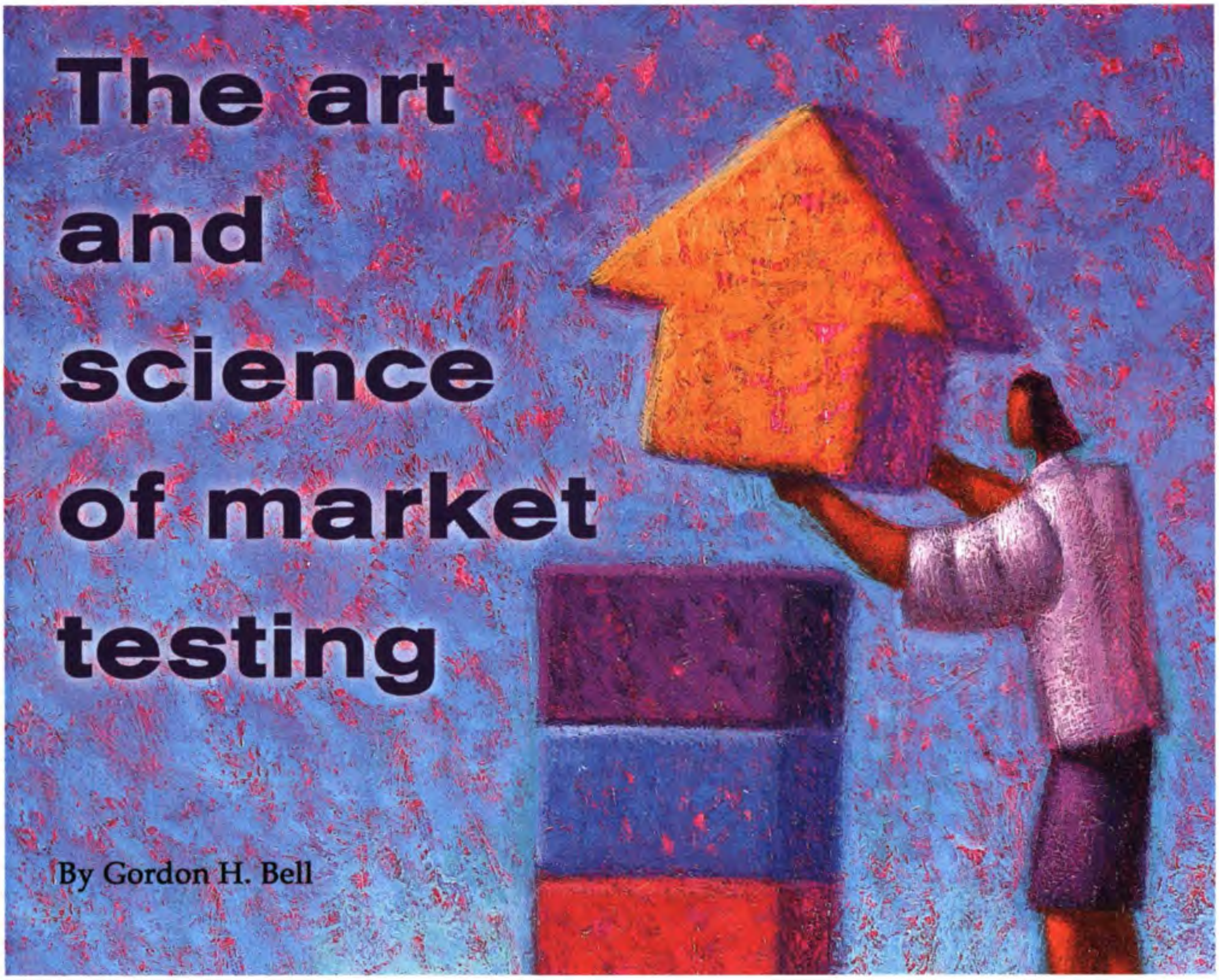
If these actions result in a positive customer response, invest in building and managing a customer-level database. Such a database takes market segmentation down to individual customers, and allows instantaneous access to detailed customer preferences. This investment signals management's commitment to customization and you are on your way.

Remember that in most cases, a service provider may be able to offer only customization, not MASS customization. Unlike manufacturing, services by their nature are less customizable on a mass scale. For service providers that pursue customization, short-term profitability and financial recovery of investments would come from the customer's willingness to pay premiums for individualized offerings. In the long-term, however, the big payoff would come from customer relationships and loyalty. After all, customers benefit from the arrangement as well; they get what they are looking for every time, without having to re-express preferences and re-establish relationships.

Persevere

You've made it through Step 4! Once you decide to pursue customization, persevere. Mass customization of services is not the pursuit of a solitary team or department; it requires a long-term commitment from the entire organization.

Your customers may not understand what you've gone through to deliver their preferences, but if you ever get your nuggets on a bun, at least you will appreciate what happened behind the scenes.



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After 75 years, market testing is becoming the Cinderella of the research world. Initially, either ignored or over-worked, testing was often perceived as too simple or unglamorous to be worth the attention of high-level managers. Also, with only basic tools and minimal education in the testing process, many marketers had a superficial understanding of how real-world tests should be designed and managed. So testing has been crude and hindered by unclear results.

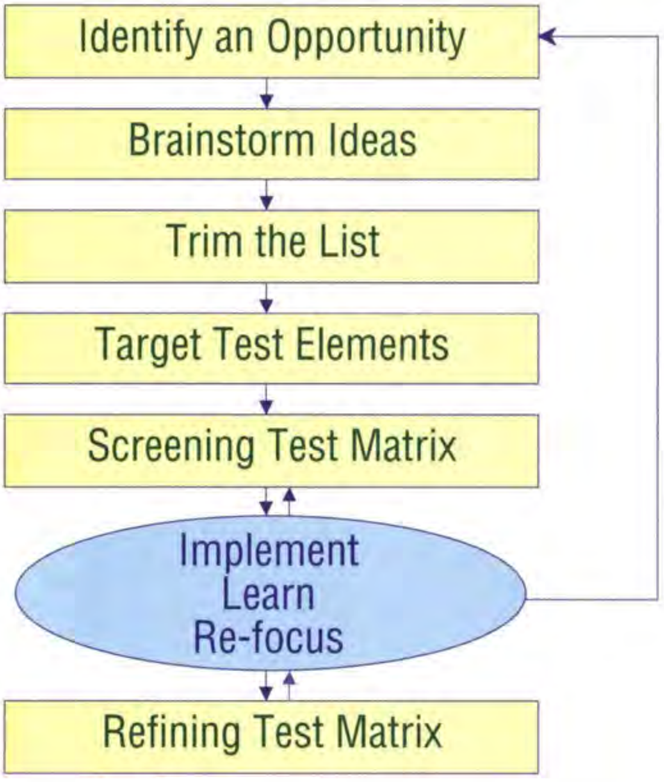
Now the transformation has begun. A new, streamlined approach has given marketers a clear strategy to harness creativity and identify new opportunities for growth. In addition, advanced statistical techniques — first introduced nearly 50 years ago — have recently been refined, offering managers the freedom to test dozens of elements all at once as fast as most companies test one new idea alone.

The matrix marketing strategy: raw ideas transformed to a wealth of opportunity

The ultimate "glass slipper" is a strategy that fits the art together with the science of market testing. It combines creative freedom and scientific discipline to help marketers brainstorm new ideas, identify a solid list of variables that may impact sales, run a fast multivariable market test, quantify the precise impact of each test element, and rapidly implement changes proven to increase profitability. This new approach, often called matrix marketing (MxM), helps marketers pinpoint ways to rapidly increase sales through direct mail, catalog, retail, advertising, e-mail, and Internet channels.

The creative benefit of matrix marketing is its ability to quickly pinpoint the best ideas to improve market performance. The technical benefits of MxM come down to quantity, speed, and depth of learning. Marketers can test a multitude of creative, offer, list, and product elements all in one market test. They can test three or 33 variables with the same sample size just as fast as a test of one new creative against the "control." In addition, results show exactly why a new creative worked —

Figure 1: The Matrix Marketing Strategy



ranking the elements from best to worst, pinpointing the root cause of good results, and giving in-depth information about the impact of each element on its own and in combination with others.

The basic matrix marketing strategy is shown in Figure 1.

The first step is to assess marketing programs and metrics to find the best opportunity to increase sales and strengthen competitive position. The initial MxM project should have:

• clear measures of success (objective, quantifiable data);

• strategic significance and high potential payback;

• visible senior management support;

• production flexibility (multiple versions possible);

• speed (minimal development and data lag).

The second step is to pull everyone together and brainstorm every possible change that may increase sales or reduce costs: segmentation, positioning, offers, vehicles, words, pictures, or any other specific change someone thinks may help.

Next, trim the list to one to three dozen elemental ideas, ideas that can be changed independently and are actionable, bold, and cost-effective:

• independent — each element can be changed without affecting the others;

• actionable — all elements can be implemented quickly and safely, with generalizable results that can be broadly applied to future campaigns;

• bold — substantial change between test levels (avoid testing "tweaks");

• cost-effective — the change should cost no more than current tactics.

From this list, the marketing team can then define specific test elements with two levels for each: the current "control" and a change that someone thinks will improve marketing effectiveness. For example, "Make the envelope stand out in the mail" may be an idea; "envelope color: white versus bright blue" may become the test element.

These first four steps of the matrix marketing strategy require no statistics, but are the most important part of any test. For every test element, you must ask: "What can we learn from this?" and "Is the change bold enough to stretch our market knowledge?" Matrix marketing should leverage the marketing team's skills and experience while pushing them beyond their comfort zone.

The statistical power of this multivariable test strategy is concentrated within the "screening" and "refining" tests. Screening tests quantify the impact of lots of variables at once, while refining tests zero in on the best possible settings for the few important elements. This screen-refine test cycle lets you cast a wide net to search for new opportunities, then quickly optimize and implement the best changes to increase sales and reduce costs. After interpreting and implementing results — building market wisdom

Figure 2

Test Element	(–) Control	(+) New Idea
A: Market segment: previous responders	No	Yes
B: Market segment: age	Under 35	35+ years
C: Subject line	Special offer	Creative tagline
D: Personalization	No	Yes, insert name
E: Sender name	Company	Person
F: Page design	Standard Web page	New page design
G: Sidebar	Words	Graphics
H: Colors	Cool (darker)	Hot (brighter)
I: Animation of graphics	No	Yes
J: Table of Contents	No	Yes
K: Copy messages	More direct sell	More informative
L: Copy length	Short	Long
M: Section headings	No	Yes
N: Number of links in copy	1 per offer	2 per offer
O: Special discount (with e-coupon)	No	Yes
P: 800-number option	No, online only	Yes, "or call 1-800"
Q: Font	Normal	Use bold & color
R: Unsubscribe copy	Basic	Explanation of loss

along with profit — the team can move on to the next opportunity.

Case study: e-mail test

Now we'll look at an example of an MxM screening test. A marketing vice president wanted to increase the effectiveness of her e-mail marketing programs — increase open rate, click-through, and sales, plus reduce unsubscribes. Testing HTML e-mails, she also hoped to find creative elements that could be confirmed and implemented on the company Web site. Her team brainstormed 95 ideas, then zeroed in on 18 elements to test — all 24 recipes, and so on. Every recipe gives information about every test element, so sample size is not affected by the number of test elements or recipes. In fact, if a simple "champion-challenger" test with two e-mail versions requires at least 150,000 names (for statistical precision), then with those same 150,000 names you can test up to 39 different variables all at once.

In addition, since the matrix marketing strategy tests combinations of elements, you can also calculate interactions between elements. For example, one test showed that a free gift and 15 percent discount each increased

Figure 3

	Segment: previous responders	Segment: age	Subject line	Personalization	Sender name	Page design	Sidebar	Colors	Animation of graphics	Table of Contents	Copy messages	Copy length	Section headings	Number of links in copy	Special discount (e-coupon)	800 number option	Font	Unsubscribe copy
Recipe	**A**	**B**	**C**	**D**	**E**	**F**	**G**	**H**	**I**	**J**	**K**	**L**	**M**	**N**	**O**	**P**	**Q**	**R**
1	+	+	−	−	+	+	+	+	−	+	−	+	−	−	−	−	+	+
2	−	+	+	−	−	+	+	+	+	−	+	−	+	−	−	−	−	+
3	+	−	−	+	+	+	+	−	+	−	+	−	−	−	−	+	+	−
4	+	+	−	+	+	−	−	+	+	+	+	−	+	−	+	−	−	−
5	−	−	+	+	+	+	−	+	−	+	−	−	−	−	+	+	−	+
6	−	−	+	+	−	+	+	−	−	+	+	+	+	−	+	−	+	−
7	−	+	+	+	+	−	+	−	+	−	−	−	−	+	+	−	+	+
8	−	−	−	−	+	+	−	+	+	−	−	+	+	+	+	−	+	−
9	+	+	+	+	−	+	−	+	−	−	−	−	+	+	−	+	+	−
10	−	+	−	−	−	−	+	+	−	+	+	−	−	+	+	+	+	−
11	+	+	+	−	+	−	+	−	−	−	−	+	+	−	+	+	−	−
12	+	−	−	−	−	+	+	−	+	+	−	−	+	+	+	+	−	+
13	+	+	−	+	−	+	−	−	−	−	+	+	−	+	+	−	−	+
14	−	−	−	+	+	−	+	+	−	−	+	+	+	+	−	+	−	+
15	+	−	+	−	+	−	−	−	−	+	+	−	+	+	−	−	+	+
16	−	+	+	−	+	+	−	−	+	+	+	+	−	+	−	+	−	−
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19	+	−	+	−	−	−	−	+	+	−	+	+	−	−	+	+	+	+
20	−	−	−	−	−	−	−	−	−	−	−	−	−	−	−	−	−	−

at once, in one drop, with 150,000 names (Figure 2).

An expert worked with the team to design a matrix to test everything with just 20 e-mail "recipes," each with a unique combination of all 18 elements. Though the statistical basis of these test designs gets complicated, the concept is fairly straightforward.

Matrix tests require at least one more recipe than the number of test elements and the number of recipes is always some multiple of four. For example, marketers can test 15 variables with 16 recipes, 16-19 variables with only 20 test recipes, up to 23 variables with sales, but both together were no better than the discount alone. Another test showed that a sticker on the letter had a much larger impact combined with a low product price than with a high price. Figure 3 shows the MxM matrix for the e-mail test.

How to create the "recipes" in a matrix

Looking at the matrix, each row is a recipe — one version of the e-mail. Each column is one test element (A-R). Every minus in the matrix means that element should be set as in the control and every plus means the element is changed to the "new idea."

First look at recipe No. 20: this row is all-minus, or the control. Each other recipe has about half the elements like the control and half with the new setting. Now look at recipe No. 1. To create this version, you need to:

• send it only to previous responders over 35 (A+, B+);

• use the "special offer" subject line with no personalization (C-, D-);

• have the sender name a person (E+);

• use the new page design with graphics on the sidebar, brighter colors and no animation (F+, G+, H+, I-);

• insert a table of contents, use long, direct-sell copy, no section headings, and one link per offer (J+, K-, L+, M, N-);

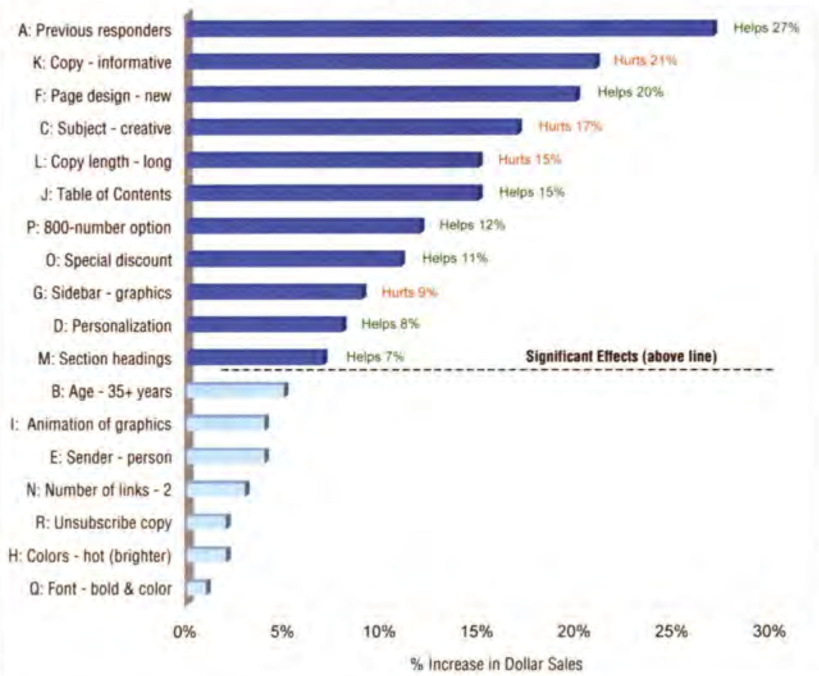
• do not offer the special discount or 800-number (O-, P-);

• use bold and color in the font and the new unsubscribe copy (Q+, R+).

Then for recipe No. 2, the e-mail will be sent to a different segment and eight other elements must be changed from recipe No. 1.

The process does take a bit more effort than a simple A/B split, but the return — in knowledge and profit — more than makes up for a few extra

Figure 4: E-Mail Test Results



days of creative work. Also, the independence of test elements means that after all elements and +/- levels are defined, the recipes are simply cut-and-paste combinations.

The basic math behind the high-powered statistics

These test designs are based on matrix algebra, statistical probability, and more advanced mathematical concepts. However, in simple terms, the reason this type of test design is so efficient is the perfect balance of the + and – levels. For example, look at column A: you see 10 + and 10 – recipes. Now look at just the 10 + recipes (1, 3, 4, 9, 11, 12, 13, 15, 18, 19): column B has five + and five –; column C has five + and –; columns D through R are similar. With this perfect balance, you can calculate the effect of each test element independently of everything else you change. The effect equals the average of all + recipes minus the average of all – recipes. No matter how large or small the effect of all other variables, the impact of element A comes out the same.

The analysis is a bit more complex due to experimental error, confounding error, and the unique challenges of dynamic markets and uncontrolled variation. Yet the basics remain the same — with a solid group of elements, good test design, and careful supervision, a well-run test should give fast, clear, cause-and-effect results.

This balance (or "orthogonality") also means that you can use the same sample size no matter how many variables you test. If you normally need to mail 300,000 catalogs for a simple A/B split, you can mail the same number for a 24-recipe test — just 12,500 books per recipe.

Testing all 18 of these e-mail elements using simple champion-challenger test methods would require 1,425,000 names (essentially, 18 separate tests). Alternately, testing all combinations of these 18 elements would require 262,144 recipes. Matrix marketing provides all the real-world data you need to prove what sells, but with a manageable number of names and test recipes. The key is to include all variables within one test, with an element-to-recipe ratio of between 1:1 and 1:2 (the higher ratio when advanced techniques are used to give more detailed information).

Many marketers see such a large return on MxM because they never before had the creative freedom and scientific precision to pinpoint the impact of so many new ideas at once. So instead of finding one or two changes to increase sales, they discover five or 10 all at once.

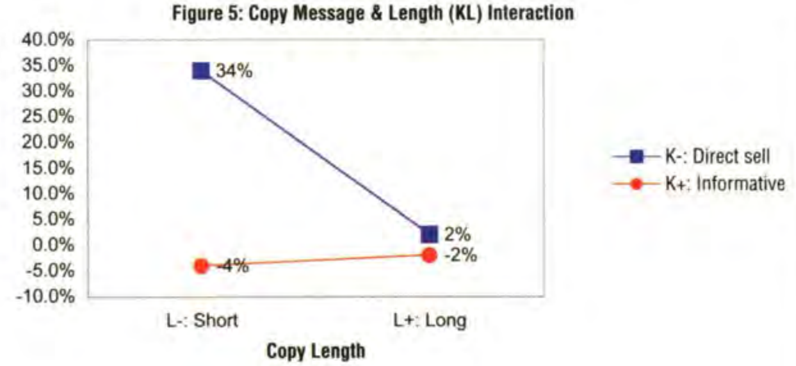
For the e-mail test, all 20 versions were sent on the same day. Test results, analyzed in real time over hours and days, showed the precise impact of each element on its own and interactions among elements. Figure 4 summarizes what they found.

Test results

Looking at Figure 4, everything above the dashed line is statistically significant. On the left is the list of all "new ideas," showing their impact from largest (A) to smallest (Q). On the right, the bar shows the size of each effect — as a percentage change in sales produced by switching from the minus to the plus level — and whether the "new idea" was better (helps) or worse (hurts) than the control.

For example, element A ("previous responders") helps increase sales by 27 percent (it was added, along with "age," to segment the list and block known differences from the experimental error). This means that previous

Figure 5: Copy Message & Length (KL) Interaction



responders bought 27 percent more product on average than non-previous responders. Then for K ("copy – informative"), the "new idea" actually reduced sales by 21 percent versus the control of "more direct sell"; people who received the e-mails with informative copy bought 21 percent less product, on average, than those who received the direct-sell copy.

Based on these market results, the best e-mail will increase sales 73 percent over the control (without including the sales increase from "previous responders"). Many of these important elements — formats, graphics, content, and offers — were also confirmed and implemented on the Web site.

Overall, sales increased with the new page design, table of contents, 800-number, and special discount. Personalization and section headings in the copy also helped. Some new ideas hurt sales: more informative copy, a creative subject, longer copy, and sidebar graphics all reduced sales, so the team kept these at the control level. In addition, elements that made no difference were adjusted to reduce file size.

If all new ideas had been implemented after a typical "package" test, they would have seen an 11 percent increase in sales — not bad, but a big difference from the 73 percent gain they achieved by implementing the six helpful and avoiding the four harmful elements.

Interactions

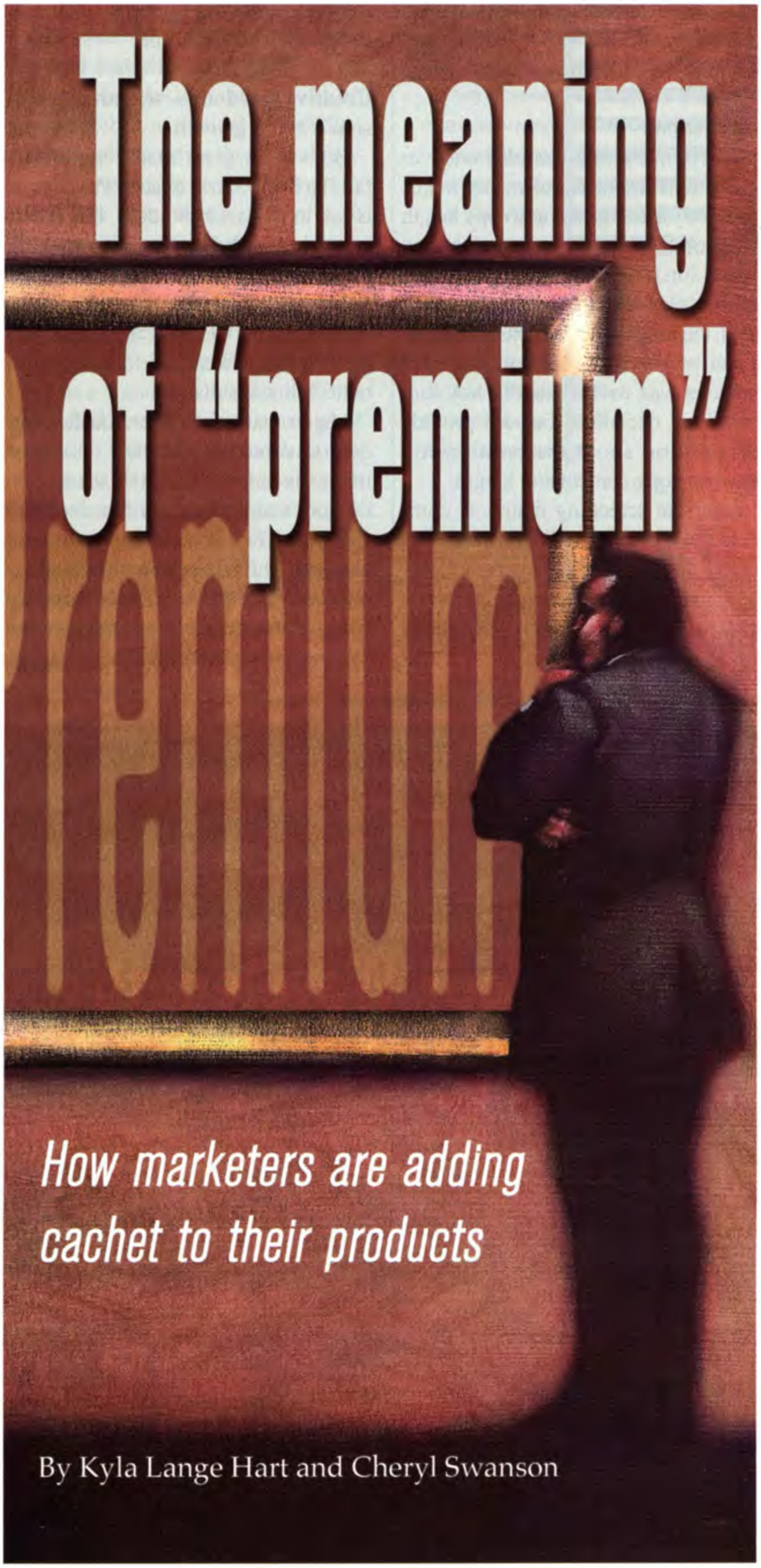
Matrix marketing can also uncover interactions among test elements. In this case, copy message (K) and copy length (L) produced an important two-way interaction. Though overall, the direct-sell message and short copy increased sales, the long copy was actually slightly better when the more informative message was used. This did not alter their final decisions, but did provide information about the relationship between copy content and length.

After the screening matrix is completed, one or two smaller refining tests often follow. A refining matrix follows the same principles as screening, but is designed to better clarify interactions and also test new combinations of significant elements. Within the matrix marketing strategy, you can use a wide range of multivariable test designs depending on your interests — whether testing a multitude of new ideas quickly, or refining a few important elements to optimize performance.

Creative freedom + scientific precision = rapid growth

How many great marketing efforts fall flat in the marketplace? The answer is not to restrict new ideas, but to test and quantify the impact of everything you want to try. Marketers who do it right are like creative scientists...generating a burst of creative energy, harnessing the power, and focusing it on bottom-line results.

Matrix marketing gives you the freedom to simultaneously test dozens of innovative ideas, zero in on the specific tactics and elements that increase sales, and rapidly implement proven changes. The power of matrix marketing is no fairy tale, but a way to quickly transform simple ideas into genuine success in the marketplace.



The meaning of "premium"

How marketers are adding cachet to their products

By Kyla Lange Hart and Cheryl Swanson

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The world of marketing has become dominated by that oh-so powerful and yet ephemeral practice of branding. In the last 20 years we have seen everything from thingamajigs to mutual funds to health services to people become branded. As a marketer, the overall goal is to clarify your product or service's proposition and develop a relationship with the consumer. It may sound simple, but human relationships are not simple and consumers are fickle and demanding. This, combined with an increasingly crowded and competitive marketplace, requires a distinct voice, tone, and manner for your product or service. In brand-land the key to success is walking the fine line between appeal, need, and differentiation. Just when you don't think your category can be segmented or nuanced anymore, trust that someone somewhere is innovating and will be challenging you sooner than you think.

It has been fascinating to work as brand consultants through the past two decades and watch and participate in the practice as it has evolved and matured. There were a myriad of changes in the '90s as mass products and services looked for new ways of reaching out and emotionally connecting with their audiences. We now seek to build brand cultures and visual vocabularies. It has become an anthropological, psychological, and physiological endeavor as well as a business proposition. In a broad review of projects from yesteryear and today a major branding paradigm shift was revealed. The desire to communicate "quality" has morphed into capturing and expressing the qualities of "premium."

Once upon a time (in the mid- to late '80s), almost every project brief listed "quality" as the critical brand descriptor. Thankfully, using quality as a major brand anchor has evolved to more descriptive functional and emotional attributes. Through research and more creative marketing approaches, brand teams are striving to carve out distinct strategies and personalities for themselves. However, we now see "premium" often listed as a critical part of a brand's persona. It has become the generic descriptor du jour. This is certainly a result of recent fat economic times combined with the insatiable U.S. desire to communicate "the best" or "superior."

To inform ourselves and our clients, we set out to better understand the meaning of "premium." What does it look like and how does it segment? How can it be used to distinguish a brand in the cacophony that is today's marketplace? As brand strategists it is important to identify nuance in order to control image. If yesterday's "quality" is today's "premium," how do brands use this to create differentiation?

Today's concept of premium has responded to a strong culture of innovation and a more sophisticated, design-driven consumer. As product cycles continue to decrease and the mass-to-class movement proliferates, the look and meaning of premium has no choice but to evolve.

The dictionary definition of premium in this context is, "what one has got before or better than others" or "having or reflecting superior quality or value." What does this look like and how can it be used in branding a product or service?

Premium branding breaks down into two major segments. These are, "performance premium" and "luxury premium." Each segment has its own culture and with its own visual codes and structural cues. Performance premium helps us to keep pace with life while luxury premium helps us to enjoy the fruits of our labor. Performance could be associated with a green light while luxury is more of a red light, asking you to stop, take a deep breath and reward yourself.

Performance premium – the go, go, go vocabulary

The concept of performance premium has reached beyond the bounds of automotive engineering to become a driving influencer in our everyday lives with technology, apparel, personal care and food innovation. In addition to automobiles, the world of sport has also been a major performance premium influencer. As the pace of life continues to accelerate, performance premium provides accessories and services for our daily lives that help us in our "survival of the fastest" society. Performance premium has basically taken the language of engineering and brought it into the personal domain in fun new forms. This began with the personal computer and has impacted everything from kitchen appliances to high-performance t-shirts that wick away perspiration. This is evident in the rise of grab-and-go foods and can certainly be seen in the burgeoning nutrition bar segment, i.e., Balance Bar or Clif bar, for those who don't have time to eat. Performance premium has an egalitarian attitude that is approachable and friendly.

Performance premium is about managing our very full lives with style and substance. The key characteristic is unique, human-driven design. It is not about the object. It is about the human being using the object. It is not design for design's sake. It is thoughtful design that merges organic and man-made design attributes to create something responsive and sensitive with the ultimate cachet of "cool." It packages the future in a soft, supple manner that is inspired by nature. The goal is to be both aesthetically pleasing and ergonomic. Oxo's kitchen utensils have built a successful business on this approach to the marketplace. The brands that define performance premium have invested time, money, and effort in industrial design to brand shape and own an experience. They are design-driven organizations that recognize the marketing power of design.

A consummate leader in performance premium branding is Porsche. The impact this car designer has on the global design industry cannot be underestimated. The company looks "to create a driving experience that is as unique as the driver." Performance has always been an inherent part of the automotive experience. Today's performance premium culture is beautifully illustrated in Audi's TT series. A well-respected but cachet-challenged brand, Audi re-invigorated its brand by embracing the new performance premium. With futuristic fun it fully explores its promise to be "uncompromisingly progressive." These car examples set the pace for a plethora of design commonalities shared by performance premium brands in other categories. The leaders of performance premium borrow and integrate from one another. For instance, Nike's Shox was inspired by car design, incorporating materials and ideas from a car's suspension system to "provide a smooth, responsive ride."

The visual vocabulary shared by performance premium brands is an organic and fluid shape complemented by texture, frosted finishes, and new or re-purposed materials such as advanced metals, neoprene, or rubber. The concept of light is critical in performance premium design. Light is used figuratively and literally as lightweight and light used as a color, texture, or finish. This is exhibited in the many translucent and clear color applications in products and packaging today. When light streams through an object, it has sense of weightlessness, flexibility, and movement. Light creates an ambience that is both friendly and fast.

Efficiency is key and sizes continue to shrink down and get thinner and thinner. The idea is to be notable but unobtrusive, as with Harman/Kardon's new audio speakers. There is an emphasis on organic, aerodynamic design but not at the risk of losing some sense of fun.

Lightness also extends to the materials realm with the extensive use of titanium. Heaviness used to be a measure of substance and quality but today's world has introduced lightness as a premium cue.

The granddaddy of inspiration for

many performance premium products is Frank Gehry's Guggenheim Museum in Bilbao, Spain. This extraordinary accomplishment created a new threshold for what is possible in architecture. It is a visual celebration of the human imagination. The titanium exterior acts like a skin that feels alive as it reflects the light and environment around it. It appears to breathe as it responds to its environment. The impact of the Bilbao museum can seen in everything from sunglasses to razors.

Color is a secondary cue for performance premium. The two reigning color/material cues are clear, seeing light through the material, and titanium silver. In terms of shape there are fewer and fewer sharp edges and true efforts to respond to human dimensions and natural lines.

A spectrum of "colorways" is appropriate in this territory, ranging from the brights to deeper hues but not heavy opaques which appear to weigh things down and impede speed. Macintosh and Nokia's vast color choices have brought a new color sensibility to technology and with it a sense of personality as well as purpose.

Performance premium has invaded clothing as it has rekindled the Samsonite brand. This old luggage brand is has committed to a future by developing high-performance travel apparel in addition to travel equipment. They talk about "aerodynamic form-plus-function features that meet your need for speed."

Gillette's new Venus razor for women beautifully exemplifies the qualities of performance premium. Its organic, fluid lines are both ergonomic and comfortable for a woman's hand. The razor is lightweight with translucent materials and light blues. Physique by Procter & Gamble is another personal care brand that approaches hair care with a modern engineering attitude.

Luxury premium

Luxury premium is the second major premium category. Brands positioned in this manner are thought of as "classic," with a variety of heritage cues and an investment in tradition and craftsmanship. Luxury premium's relationship to time is opposite from performance premium. It's essence taps a time that was slower, calmer, and simpler with a feeling of doing things the "right" way even if it takes longer. Time is a luxury today. Luxury premium asks us to slow down for a moment and to indulge. This sense of indulgence can be found in the upscale department store and in the local drug store.

Luxury premium offers an air of exclusivity with a privileged club-like attitude. American Express has positioned itself here for many years with the tagline "Membership has its privileges." In some cases this premium expression can be elite and instantly signal affluence as with automobile brands such as Bentley or Jaguar. These brands express an aristocratic kind of pedigree and are more a badge of status and heritage than about designing for the user. However, luxury premium does move far beyond the super wealthy realm. It is also embraced by brands such as L'Oreal hair coloring, which has always had a sense of indulgence with its "I'm worth it" tagline.

A distinct sense of hierarchy often exists in luxury premium which sets up a good-better-best scenario. This is indicative of its roots in the past where class structure dominated society. Color is often the cue used to indicate quality. This is certainly true of the American Express line-up of cards that range from green to gold to platinum to black. Each card color symbolizes a certain level of financial expenditure and therefore wealth. This crosses over to the liquor category where product color and packaging denote the good, better, and best options. The language of premium liquors evokes luxury and indulgence by articulating process (handmade; aged) and the rare, special nature of the ingredients. Very often time is an integral part of the value or quality assigned to liquor. The longer it has aged, the more premium it is. The "call" for Johnnie Walker is by color to indicate quality and status. Respectively, red, black, or blue is used to segment this brand. Patron tequila uses both the color of the product (gold or super premium silver) and a unique label color (yellow, orange, lime green) to signal the "level" of premium for a specific product.

The color territories shared by luxury premium brands are primarily opaque, rich colors. Metallic accents are common themes with an emphasis on gold. The shapes are primarily geometric and the packaging generally has elements of craftsmanship and dates or some stylistic detail evoking a previous era. The textures integrate traditional techniques such as embossing/debossing and hot stamping.

A master of luxury premium is Ralph Lauren. As an astute lifestyle marketer and designer, he has built an empire on the luxury premium premise of creating appeal through tradition and heritage. He is brilliant at creating a fanciful world that many would like to be a part of. He delves into the past and brings it forward with style, elegance, and flair and creates desire in the process. With his Purple Label collection of hand-tailored men's clothing and furnishings he is bringing back a style of American society in the '20s and '30s.

Science of precision

If branding as a discipline is the art of broad appeal then it is also the science of precision. Across both premium categories, performance and luxury brands use design to position themselves with clarity and precision. The marketing premise is understood and conveyed through visual means in each premium category. The objective is to be specific not generic in your specifications so that you can tell a rich and meaningful story with which to build a rich and meaningful relationship with the consumer.

Research Industry News

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TNS Tellex and **Parker Bishop** have announced that they are to re-brand as one dedicated media monitoring agency — TNS Media Intelligence. The new name is part of a global re-branding of the Media Intelligence sector of U.K.-based Taylor Nelson Sofres (TNS).

Association/organization news

The European Society for Opinion and Marketing Research (ESOMAR) has appointed Chris van Schijndel as its new director general. Van Schijndel takes over from acting Director General Mario van Hamersveld. From 1981 onwards Van Schijndel managed international marketing research for Volvo. In 1990 he took up a similar function with Nissan Europe, became product marketing manager for a number of models in 1995, and subsequently marketing director for Nissan Motors in the Netherlands a few years later. Since 2000 he has been located in Paris, acting as chief marketing manager for part of the Nissan line in Europe, within the framework of Nissan's alliance with Renault.

The Focus Facility Association, an organization representing 21 focus group facilities in the New York, New Jersey, and Connecticut area, has celebrated its first anniversary. The organization's primary goal is to keep the lines of communication open between qualitative researchers and facility management for the purpose of promoting professionalism, establishing ethical standards, eliminating professional respondents, and developing a partnership to better understand the needs of both facilities and clients. The organization is open to all facility management within the area whose qualitative research activities represent at least 50 percent of their organization's business.

Awards

Fairfield, Conn., research firm **Survey Sampling Inc.** (SSI) has been named Supplier of the Year by the **Gallup Organization**. The award is presented for the highest levels of marketing research consultation and service. Recipients are rated on accuracy, responsiveness, credibility, partnering, trust, and discovery. Jessica Smith, SSI senior account executive, manages the Gallup account. Special mention also goes to Linda Piekarski, Missy Richards, and Jerry Cap, as well as SSI's production, data products, database, and information systems departments.

New accounts/projects

San Diego-based marketing information firm **Claritas Inc.** has formed an agreement with Cox Target Media (CTM) to provide lifestyle segmentation data through its PRIZM system to strengthen the value of CTM's Valpak envelope of offers.

Target Corporation has renewed its information-sharing contract with **ACNielsen** U.S., Schaumburg, Ill. Under the new agreement, Target also signed on for ACNielsen's Category Business Planner (CBP). Separately, ACNielsen U.S. announced that Merisant U.S., Inc., a tabletop sweetener firm, has selected ACNielsen as its preferred provider of syndicated marketing research information and insights for U.S. markets.

Greenfield Online, Inc., a Wilton, Conn., research firm, has added three new firms — **Hall & Partners**, **MORPACE International**, and **MRSI** — to its partner program.

Information Resources, Inc., Chicago, has been awarded a new multi-year contract to provide data, analytic insights and software applications to the Defense Commissary Agency (DeCA). The expanded agreement will include CPGNetwork, IRI's Web-based decision support tool, as well as ad hoc and pre-formatted reports. DeCA generates sales of $5.1 billion annually, providing groceries and related items to qualified military personnel. It has 281 stores worldwide.

New companies/new locations

Market Researchers & Analysts has opened a new focus group facility in Newport News, Va. Amenities include a 20x20 focus group room, ceiling-mounted video cameras, and a separate pre-staging area for catering, screening or IDIs. For more information contact Peggy Moulton-Abbott at 800-868-0330 or at peggy@mr-a.com.

In March, **Galloway Research Service**, San Antonio, Texas, dedicated its new opinion research center to the company's founder, the late Ruth K. Galloway. The dedication ceremony was held in the lobby of the firm's new headquarters at 4751 Hamilton Wolfe and included an unveiling of a bronze plaque bearing a likeness of Ruth Galloway. Each of the new facility's three focus groups suites is themed in a different South Texas décor, including Hill Country, Spanish Mission, and Gulf Coast. For more information contact Elisa Galloway at 210-734-4346.

CRA Superooms has relocated its Bay Area facility to 450 Sansome St., 8th floor, San Francisco, Calif., 94111. The new location has five full-size focus group suites featuring wraparound two-way mirrors for enhanced viewing. The phone number remains 415-392-6000.

New York-based **RoperASW** and **NOP Research Group**, two operating units within NOP World, have formed RoperNOP Technology, a new entity which will provide research and consulting services to U.S.-based technology companies. RoperNOP Technology will include research staff from RoperASW, NOP, and CMP Media, a technology publisher and sibling organization to NOP World. The unit will be based in New York and supported by staff in London, Princeton, Dallas, San Francisco, and Seattle.

A new online research company,

Amplitude Research, Inc., has been founded at 600 South Adams Road, Suite 210, Birmingham, Mich., 48009-6863. Phone 248-594-5588. Fax 248-594-5599. Stephen S. Birnkrant is the firm's founder and CEO.

A new research firm, **Inner Portugal**, has opened at Av. República No. 41 1050-187, Lisbon. Oscar Escribano is the firm's director general. The offices include qualitative research facilities, simultaneous translation equipment, videoconference equipment, and 10 CATI posts. For more information call 351-21-780-2840.

Company earnings reports

Irving, Texas-based **Aegis Communications Group, Inc**., a CRM and research firm, released financial results for the quarter and year ended December 31, 2001. The company reported earnings before interest, taxes, depreciation, and amortization (EBITDA) for the fourth quarter of 2001 of $4.3 million on $55.9 million of revenue as compared to EBITDA of $1.9 million on revenue of $56.3 million in the third quarter of 2001. Net loss after preferred stock dividends for the fourth quarter of 2001 was $8.7 million, which includes the effect of a $6.0 million reduction in the net realizable value of the company's long-term deferred tax asset, or ($0.17) per share, as compared to a net loss after preferred stock dividends in the third quarter of 2001 of $4.6 million, or ($0.09) per share. For the year ended December 31, 2001, the company generated EBITDA of $17.5 million on $237.3 million of revenue, versus EBITDA of $16.8 million on revenues of $295.4 million for the prior year period.

National Research Corporation, Lincoln, Neb., announced revenues for the fourth quarter ended December 31, 2001 were $4.1 million compared with revenues of $4.2 million for the fourth quarter of 2000. Financial results in the fourth quarter were affected by pre-tax legal expenses of $359,000 related to a previously announced lawsuit. Net income for the fourth quarter, excluding the aforementioned legal expenses, was $411,000, or $0.06 per basic and diluted share, compared with net income of $742,000, or $0.11 per basic and diluted share, in the prior-year period. Including legal expenses, net income for the quarter ended December 31, 2001, was $192,000, or $0.03 per basic and diluted share. Revenues were $17.7 million compared with revenues of $18.3 million for the year-ago period. Net income, excluding pre-tax legal expenses of $980,000 related to the lawsuit, was $2.3 million, or $0.32 per basic and diluted share, compared with net income of $2.7 million, or $0.39 per basic and diluted share, in the prior-year period. Pre-tax expenses related to the lawsuit in 2000 were $34,000. Including legal expenses, net income for the year was $1.7 million, or $0.24 per basic and diluted share.

Survey Monitor

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The market for breath-freshening toothpaste is substantial in Britain, with more than 43 percent of adults specifying "fresh breath" as a primary reason for using toothpaste rather than for "dental health" or "whitening."

"The higher levels of fresh breath amongst people in Britain, compared to other European countries, may be related to cultural differences such as diet," says Matt Stockbridge, account director of ETCD, Taylor Nelson Sofres. "The growing number of people in Britain who are selecting toothpastes for the purpose of leaving their breath fresh has resulted in oral care manufacturers developing a wide range of new fresh breath products, from toothpastes to chewing gums. The expansion of the oral care market looks set to continue and new, innovative products are anticipated during 2002."

Additional findings from Taylor Nelson Sofres' Superpanel indicate that, on average, Britons buy a new toothbrush twice a year, with people in the South buying the highest number of toothbrushes. Manual toothbrushes remain the most popular, with around 80 percent of buyers purchasing manual brushes, compared to just 20 percent opting for electric/battery-operated brushes. For more information visit www.tnsofres.com.

Cell phone ownership grows 29 percent from 1999-2001

A study from Scarborough Research, New York, shows a 29 percent growth rate for cell phone ownership over the past two years with almost two-thirds (62 percent) of American adults owning a cell phone.

The study shows Houston leads the nation with almost three-fourths (74 percent) of adults owning a cellular phone. Other cities that have a high concentration of cell phone ownership are Atlanta (73 percent), Honolulu (70 percent), Miami (69 percent), and Dallas (69 percent) — all above the national average.

Ranking on the low end with the lowest percentage of wireless adults are Roanoke, Va. (49 percent); Albany, N.Y. (49 percent); Wilkes-Barre, Pa. (46 percent); Buffalo, N.Y. (45 percent) and Charleston, W.Va. (39 percent).

Scarborough's market trending data shows that in 1999, slightly less than half (48 percent) of American adults owned a cell phone. In 2000, more than half (55 percent) of U.S. adults owned a cell phone and in the latest 2001 study, cell phone penetration numbers are up to 62 percent. All indicators demonstrate that the numbers will continue to grow since 9 percent of American adults plan to purchase a cell phone in the next year.

"Overall, it is clear that wireless phone penetration continues to increase but what is important to note is the variance by local market," says Alisa Joseph, vice president of advertiser marketing services, Scarborough Research. "While some local markets have extremely high penetration for wireless users, other cities rank well below the national average for cell phone ownership. For the wireless industry, this points to a need to target these consumers where they live, work, socialize, and commute. A targeted local campaign or wireless service package designed specifically around local market dynamics is essential to reach current and untapped customers."

This study also examined the average amount spent on monthly cellular bills. In the past month, more than one-third of cell phone owners (41 percent) paid more than $50, while almost a quarter (23 percent) paid more than $75 for their cellular service. In addition, the study shows a correlation between the amount of time spent commuting and the size of wireless phone owners' cell phone bills. Cellular phone owners who commute an hour or more are 66 percent more likely to have a cell phone bill of $150 or more.

Who is the wireless adult? He or she is tech-savvy, with almost three quarters (72 percent) accessing the Internet and two-thirds (66 percent) using e-mail. Almost a third (31 percent) shop online and close to a quarter (21 percent) play games online. Cell phone users are 25 percent more likely than the average adult to pay bills online and 22 percent more likely to purchase items or services while surfing the Web.

Cellular phone owners are slightly more often female (52 percent) than male (48 percent), age 25-54 (64 percent), and married (59 percent). Over a quarter (27 percent) of cellular households have two or more children. The cell phone consumer is affluent, with 71 percent owning their own home. In addition they are 26 percent more likely than the average adult to have a household income of $75,000+. For more information visit www.scarborough.com.

Influence of word-of-mouth rising dramatically

Goodmind, a New York research firm, has released a study demonstrating that shared opinions about product experiences, both good and bad, are increasingly affecting the purchase decisions of others. Goodmind's study on the impact of word-of-mouth shows that 92 percent of survey participants had made a purchase within the last 12 months based upon the word of another. Seventy-four percent had made a "considered purchase," such as a computer (36 percent), consumer electronic (24 percent), or an automobile (18 percent) after having first checked the opinions of someone else. "While word-of-mouth has always been a factor, the rise of the Internet coupled with ever expanding product choice is creating a class of consumers that are more and more word-of-mouth dependent," says Peter Mackey, president of Goodmind. "People are building and using networks for opinion exchange through e-mail, online customer ratings, discussion groups and other methods." The study showed that consumers use both friends and a global network of peers for purchase decisions of all types:

• Nearly one-third of the total sample stated that the influence of word-of-mouth was greater today than it was just three years ago. Among those who say that the influence of word-of-mouth is increasing, a significantly greater 46 percent claim to use online ratings and opinions.

• A solid subset of shoppers (38 percent of the total sample) say word-of-mouth is extremely/very influential in their decisions.

• 35 percent of respondents use online customer ratings and opinions in their purchase decisions.

• 12 percent claim that online customer ratings are the most important source of word-of-mouth.

Another significant finding is that women are more likely to be influenced by word-of-mouth than men. More women than men state that word-of-mouth is extremely/very influential (42 percent vs. 33 percent). Further, more women than men state that the influence of word-of-mouth is increasing (35 percent vs. 25 percent). The study looked at the specific causes of the increase in word-of-mouth as well as the categories of products that are most influenced by word-of-mouth. The study was comprised of a survey among a random sample of 1,000 American households followed by an online qualitative discussion among 30 individual shoppers. For more information contact John Greenberg at 212-744-7438 or visit www.goodmind.net.

Americans OK with O'Donnell's candor

Three-quarters (75 percent) of all Americans — heterosexual, gay, lesbian, bisexual, and transgendered — who are also aware of talk show host Rosie O'Donnell's disclosure that she is a lesbian agree that it has no effect on their feelings towards her, according to a national Witeck-Combs/Harris Interactive study. O'Donnell made news in March in her ABC News interview with Diane Sawyer by speaking up for adoption by gay parents and revealing that she, herself, is a lesbian parent.

Respondents were also asked whether O'Donnell's disclosure had an effect on their likelihood to purchase brands that she endorses. Eight out of 10 (80 percent) of all Americans said it made no difference, with 2 percent reporting they were more likely and 18 percent saying they were less likely to purchase endorsed products. Almost nine out of 10 gays and lesbians (88 percent) said it made no difference, while 9 percent said it would make them more likely to purchase.

Among O'Donnell's most popular audience, namely American women between the ages of 35 and 44, when asked specifically if the disclosure about her sexual orientation would better, worsen, or leave unchanged their opinion at all about her, 73 percent of women between ages 35 and 44 said it made no difference. Ten percent said it improved their opinions, while 18 percent said their opinions of her had worsened.

When 35-to-44-year-old American women were asked whether the disclosure changed their feelings about O'Donnell's product endorsements, 85 percent said it made no difference, while 12 percent said they would be less likely to purchase products endorsed by her; and 3 percent said they would be more likely to purchase products she endorses.

The findings are from a study of 2,017 adults surveyed online between March 12 and 14, of whom 7 percent self-identified as gay, lesbian, bisexual, or transgender (GLBT). The survey was conducted online by Rochester, N.Y., research firm Harris Interactive and Witeck-Combs Communications, Inc., a Washington, D.C., marketing and communications firm.

"The case of Rosie O'Donnell provides an excellent snapshot that aids in understanding the perceptions and the risks of the marketplace for openly gay celebrities," says Wesley Combs, president of Witeck-Combs Communications. "In general, we find that younger adults and women state a higher degree of acceptance and generally favorable impressions — all critical to Rosie O'Donnell's continued strength in the market. What is most compelling are the overwhelming numbers who say Rosie's public disclosure of her sexual orientation has not really affected their opinion, or their consideration to purchase the products she endorses."

Seventy-six percent of women aged 35 to 44 indicated they hold a favorable impression of her, while only 24 percent said they had an unfavorable opinion. A substantial majority (84 percent) also said they had seen, heard, or read about O'Donnell's disclosure, while 15 percent said they had not.

Canadians getting food to go

Research firm The NPD Group has found that Canadians in the 13-to-24-year age group are becoming increasingly important to the members of the Food and Consumer Products Manufacturers of Canada, a trade association of 165 Canadian companies that manufacture and market food and consumer products. In addition, NPD reported the number of meals Canadians take home from restaurants has grown faster than across the border in the United States. These issues were discussed at the 10th Annual Foodservice Interchange Conference in Toronto by Ailene MacDougall, vice president, NPDCanada, and Harry Balzer, vice president, The NPD Group.

Among the findings MacDougall shared were those from NPDCanada's CREST Study regarding restaurant traffic by age group. The 13-24 age group has become increasingly important to sandwich and pizza operators during the past seven years. As the consumers of the future, this age group is bringing their off-premises quick-service restaurant habits with them. Sandwiches, chicken, and pizza are popular choices, with chicken gaining in popularity, while pizza is declining.

"It's important to see where the 13-24-year-olds are going because 24-35-year-olds, whether single or in two-adult households, spend an average of 15 percent more per eating-out occasion than other age groups. In addition, their restaurant visit frequency is up 19 percent versus the market which went up by 10 percent during the period of 1994 to 2001," says MacDougall.

"Both Canadians and U.S. citizens make and eat most of their meals at home. But more and more they prefer not to cook," says Balzer. The annual number of meals per Canadian household taken out from restaurants increased by 34 percent between 1994 and 2001, while meals eaten in a restaurant went up only 2 percent during the same period. Meals eaten at home, but prepared in a restaurant, increased 15 percent in U.S. homes, while Americans ate only 3 percent more meals out in 2001 than in 1994. The use of restaurants as a source of food to be consumed at home has been steadily increasing in both countries during this time period.

Top Five Food Items for Canadian 13-24-Year-Olds in 2001

13-17-Year-Olds	18-24-Year-Olds
Soft Drinks	Fries
Fries	Soft Drinks
Pizza	Burgers
Burgers	Pizza
Chicken	Chicken

Source: NPDFoodworld

Dieting is another area of difference between Canada and the U.S. Sixty-three percent of Americans claim that they would like to lose 20 pounds, while only 53 percent of Canadians make the same claim. Twenty-five percent of U.S. residents are on a diet today, although only 17 percent of Canadians say they are currently dieting. However, more Canadians than people living in the United States think that one should avoid fat (66 percent vs. 60 percent). For more information contact Ailene MacDougall at ailene_macdougall@npd.com or Harry Balzer at harry_balzer@npd.com or visit www.npd.com.

Spinach

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Next came the first round of consumer testing. At this stage, Hoyer says, NFL wanted to validate the product concepts and also gauge reactions to them. A four-phase process was conducted with male and female consumers aged 21-64 who were their family's primary grocery shopper and who were positive toward spinach salad and cooked fresh spinach.

The first phase gathered reactions to the concept of a line of gourmet salad and sauté kits and determined purchase intent for each of the flavors (based on descriptions of the flavors, not actual tasting). Next the respondents tried the product prototypes, which were rotated so that half of the group tried the sautés first and half tried the salads first. "We gave them a description of the flavor in a kit and then had them sample it. They then gave us purchase interest, their opinions on the product concept fit, as well as specific information such as the amount of dressing, the amount of sauté mix, etc.," Hoyer says. "So at this phase we were trying to get reactions to prototypes and whether we needed to modify them in any way and determine if the prototypes met the expectations they had after hearing the concept."

The third phase was a test of packaging. Respondents were taken to a separate area featuring a mock store display of three packaging concepts and asked to rank their preferences for the different graphics. In the fourth phase the consumers viewed a large copy of the nutritional information for a salad kit and a sauté kit. "Without specifically asking about it, we were interested in their reaction to things such as fat content," Hoyer says. "They had given us purchase interest, but was there anything about the nutrition information that would make them less likely to buy the product?"

The testing validated that gourmet salad kits and sauté kits were of interest to consumers and also showed which flavors were most popular. "In the salad kits, the honey citrus flavor profile was very much desired by consumers," Whitaker says. "They liked the idea that they could put walnuts and dried cranberries on the salad to give it a unique flavor. On the sauté side, the sun-dried tomato-garlic flavor profile really carried the day. Consumers liked being able to cook something up quickly. It fit the idea of convenience, having a hot side dish with little prep time, because we were looking at something that you could prepare in about three to five minutes."

Next, NewStar conducted focus groups in two U.S. cities. Again, respondents were introduced to the spinach salad mix and sauté concepts, and they viewed packaging mock-ups and sampled the products. Everything tested well, Whitaker says. "The concept scored high. People liked this idea, it met their needs. And after they tasted the products, they indicated we delivered against the concept — in many cases the scores actually went up after they tasted it, especially in the case of the honey citrus variety."

But there was one new wrinkle: respondents made it clear that NewStar had to add a bacon dressing variety to the salad mix line. "Even though we had tried to stay away from a bacon flavor profile, it was just absolutely associated with spinach. People went into long stories about how they painstakingly prepared their bacon spinach dressing. These people were passionate about it! So we realized coming out of this that we were going to have to add a bacon dressing as well," Whitaker says.

A recipe for good food testing

The NFL's Christie Hoyer offers a few quick tips for companies considering conducting some food research.

1) Be aware of consumer fatigue during testing. "Not only in terms of taste and aromas — which is what a lot of people take into account — but also in terms of mental fatigue. Sometimes clients just simply ask consumers to do too much."

2) Second, there are myriad small details to manage when testing food, including product preparation, food temperature, serving size, the types of serving containers used, etc. "It's important to use a firm that has a lot of experience in this type of testing so that they pick up on all of the nuances," Hoyer says.

3) As with any kind of research, recruiting is an important factor. Make sure the firm gets you the target audience you are looking for.

4) Hoyer also recommends using a facility that is designed for food testing. Proper ventilation, for example, is necessary to avoid letting in extraneous smells during the research, which could mar the process and result in respondents reacting to scents that aren't part of the test product.

Economically feasible?

NewStar took the findings from the focus groups and went back to work with the NFL on the economics of the new products, examining ingredients, shelf life, and costs, to determine if NewStar could produce the high-quality flavor profiles it desired using ingredients that might be more reliably available and cost-effective. "This is a very competitively-priced business and there is a top end to what you can expect a consumer to pay for prepared salads," Whitaker says. "So we wanted to make sure that we lived within those guidelines and could present it to the retailers at a price that was attractive as well."

The process of making the ingredient list cost-effective is a combination of art and science, Hoyer says. "One advantage we had was that we had the starting formulas and what the starting flavor profiles were supposed to be and we looked at them and said, OK, is there any way that we can achieve the same flavor profiles but cut down on the costs of the ingredients? We were able to do a couple of things with some flavorings that cut a pretty good chunk out of the cost of the product while retaining the same flavor profiles."

Gradual climb

Since the salad and sauté mixes were introduced, they have been a hit with retailers and with consumers, Whitaker says. "Sales took off very well. A few accounts took to them right away, and it has been a gradual climb ever since. The products comprise about a quarter of the total business in spinach for us on a unit basis. It gives our customers a choice. Everybody wants to take the Young & Tender spinach — that's still far and away our biggest seller — but if they want other facings, this gives the retailer a lot of choices.

"We have also gotten a lot of positive feedback from consumers. We have an 800 number on our bags and it's not unusual to get two or three phone calls per month — which is amazing — where people say how much they enjoy the dressings and the kit concepts."

Advertisement

Consumers Brake For In-Store Studies

In the retail environment, shoppers aren't just recalling "why." Rather, they are driven by the "why" of that very moment. The shelf and shopping experience are the final purchase catalyst.

By William J. Hruby

Editor's note: William Hruby is a market research and advertising consultant with nearly two decades of packaged goods marketing experience.

The challenge for packaged goods marketers: the consumer in the aisle, at the shelf or register is at the intersection where packaged goods and consumer motivations converge full speed. 100% of all final buying decisions are made in-store. Yet research is most commonly conducted on-line, in malls, mail panels and other locations, far removed from the point-of-sale.

Go where the shoppers decide to buy. Consumers must be intercepted in the store where product A is selected over product B, where motivations are bright signals in the consumer's mind. Meet that same consumer at another location two weeks later, and it is unlikely they are able to remember their purchase decisions, awareness of brand options, motivations for purchase, etc. And certainly not with the same degree of accuracy as an interview conducted at the point-of-purchase. Further, they may not speak with you at all.

Participation is seriously slowing for traditional research methods. In Marketing Research (Spring, 1998), authors Bearden, Madden and Uscategui reported that the pool of qualified respondents is drying up. The, "Lack of representativeness resulting from refusals to participate . . . jeopardizes the accuracy of survey results."

Evidence suggests that the decline in participation rates is already occurring and may accelerate." This is part of what is driving the possibly unhealthy move of the research industry to the use professional respondents: "A tiny 4% to 5% of adults account for more than half the survey responses." (Bickart and Schmittlein, Journal of Marketing Research, May, 1999.) In addition, wave-off rates (shoppers who refuse to even be approached) hover around 90%. By contrast, in-store wave-offs typically run 30-50%. Research clearly seems more relevant and palatable to consumers at that point-of-purchase.

Three questions you should ask: According to Dr. Herb Sorensen of Sorensen Associates, market researchers must ask themselves three questions prior to going to field.

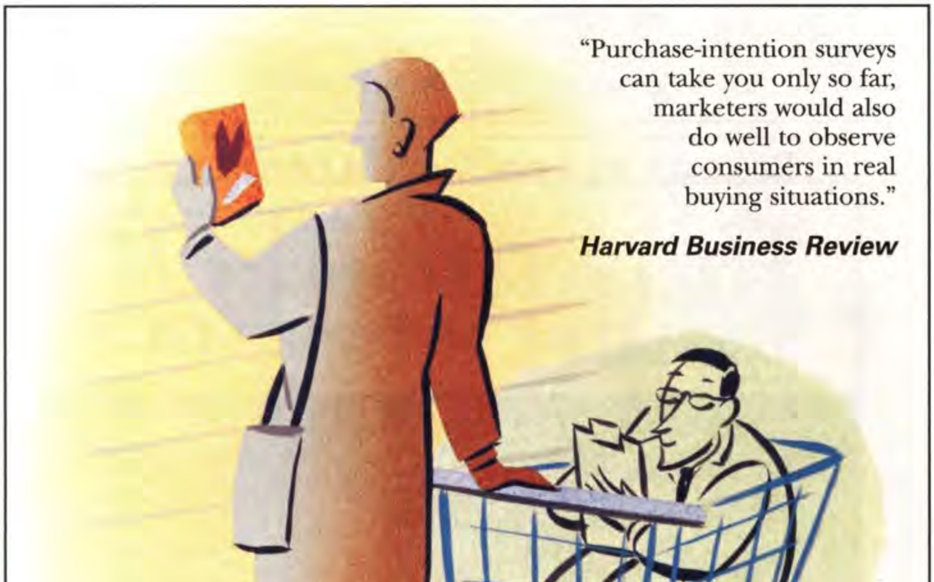
1) What information is needed?

2) Who has that information?

3) Where are they; and when are they most capable of providing the information?

For packaged goods researchers involved in concept, prototype and related phases of product development who rely on Product Guidance Research, the answers often point to in-store research. Sorensen Associates has over 40,000 retail locations available in the U.S., along with the technology to execute fieldwork in a few days. This infrastructure is at the foundation of the firm's reputation for conducting demographically structured studies at the neighborhood level.

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



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Product & Service Update

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Using TELEform v8.0, an organization can launch electronic routing of forms and documents through the LiquidOffice eForm Management system. Forms that require exception handling can be routed directly to an employee's e-mail inbox for turnaround back to TELEform v8.0.

A centralized server in TELEform v8.0 will allow companies to manage form folders and form templates for individual departments or groups, maintaining security control and eliminating time spent searching through long lists of files. New batch administration features, such as Form Reverification, also speed processing, enabling operators to move from one document to another, make corrections at any stage, re-route problem documents and reduce time and labor resources spent fixing errors in post-commitment stages.

The Remote Capture Option gives organizations the capability to scan forms and documents from anywhere in the world using remote scan stations. Forms can be electronically transmitted via the Web to a centralized TELEform Enterprise server for further processing. Organizations running Citrix can also design and verify forms remotely. For more information visit www.cardiff.com.

Book maps Census results

In a new book, *Mapping Census 2000: The Geography of U.S. Diversity*, authors Cynthia A. Brewer and Trudy A. Suchan present U.S. Census 2000 data in a series of maps that attest to the richness of this country's multiplicity. *Mapping Census 2000* describes who and what Americans are and where they are. It shows in detail the racial and ethnic shifts that have occurred since 1990. The data from Census 2000 is particularly revealing because for the first time, the questionnaire included six categories by which residents could identify themselves. The U.S. Census Bureau originally published this atlas as part of the Census 2000 Special Reports series. The book is available at book stores or at www.esri.com/esripress.

Web usability product debuts

RelevantView, a new Web usability product, has been introduced. RelevantView's proprietary interface automates the creation, launching and reporting of Web-based usability tests, reducing the time frame for marketers to run an online survey, interpret it, and implement changes.

RelevantView's hosted application allows users to understand Web visitor behavior, including that of competitors, or any Web-based application. In addition, RelevantView allows any of its clients, including agencies and market research companies, tc co-brand the surveys with their own corporate identification. The firm also announced that NOP World has licensed RelevantView's patent-pending Active Sandbox technology, and will co-brand it for online usability testing. For more information call 203-221-1310 ext. 140 or visit www.relevantview.com.

Arbitron boosts RADAR sample size

Arbitron Inc., New York, will begin using its radio diary database to increase the sample size used to tabulate the audience estimates for its RADAR network radio ratings service beginning with the release of the RADAR 73 network radio ratings report in June. RADAR (Radio's All Dimension Audience Research) is a national radio ratings service that measures audiences of radio commercials aired on 31 radio networks operated by ABC Radio Networks, American Urban Radio Networks, Premiere Radio Networks, and Westwood One Radio Networks. Arbitron acquired the RADAR radio network ratings service from Statistical Research, Inc. in July 2001. The service currently produces its estimates using a 12-month, 12,000-person telephone survey in combination with a commercial clearance collection system. Beginning with the release of the RADAR 73 report in June, Arbitron will use 12,500 diaries in each of the most current quarterly periods of the 12-month RADAR survey and will drop 3,000 telephone interviews from each of the earliest quarterly periods of the previous 12-month RADAR survey.

Briefly...

Seattle-based TeleSage, Inc. has announced that companies can use its **SmartQuest interactive voice response (IVR) survey software survey software at no cost for 90 days**. For a limited time, SmartQuest 4.3 software can be downloaded at www.telesage.com/demos.html. SmartQuest allows users to create and record their own surveys using a standard telephone and a standard PC. Responses are immediately stored and scored, offering real-time results. SmartQuest runs up to 99 IVR surveys simultaneously, in any language, and accommodates branching to different questions, surveys, telephone numbers, or voice-mail boxes based on a caller's responses. It also supports randomizations, rotations, and open-ended questions.

New York research firm Ziment now offers an **online panel** to provide access to the opinions of **patients suffering from a wide range of chronic illnesses**. Combined with Ziment's physician Internet panel, clients can now conduct studies with both physicians and patients using the Internet. The new panel profiles close to 100 different chronic illnesses among a nationally balanced panel of patients. It was created in conjunction with Lightspeed. For more information visit www.ziment.com.

Chicago-based SPSS Inc. has announced that **SPSS 11.0**, the latest version of its data analysis software, is scheduled to be **available for Mac OS X** users in the third quarter of 2002. SPSS 11 for Mac OS X will make full use of Apple's new Aqua user interface and the Unix foundation upon which the Mac OS X was built – delivering improved stability and performance. SPSS 11.0 features a new linear mixed models procedure that delivers more accurate analytical results, and enhanced data management. For more information visit www.spss.com.

Atlanta-based research firm The Brandware Group has introduced iTest, a **Web-based research methodology** designed to help marketers determine if their communications are effective enough to increase consideration and sales. Each of the 12 different types of iTest assessments evaluates the performance of a specific marketing mix component. The product has been designed to measure print, radio, and broadcast ads, agency creative concepts, corporate identity programs, trademarks, promotional collateral, public relations messages and package designs, among others. For more information visit www.itest.brandwaregroup.com.

IMS Health, Fairfield, Conn., is now offering IMS Health PlanTrak Weekly-Projected, a **new service that shows the influence of managed care on prescription drug sales and market share** in the U.S. A solution for tracking weekly prescription product performance at the managed care plan level, the product features plan-level insights on national trends. For more information visit www.imshealth.com.

New York-based research firm RoperASW has launched the 2002 FORTUNE/Roper Corporate Reputation Index, a **tool for measuring industry and public opinion about more than 450 Fortune 500 companies**. The Index provides detailed assessments of corporate reputations as perceived by industry experts and the general public. Criteria include quality of products and services, innovation, financial strength, commitment to customers and employees, and social and environmental responsibility. Respondents also indicate how likely they would be to recommend the company's products/services and stock. For more information contact Anita Dobin at 212-455-4910 or visit www.roperasw.com.

Supplier Side

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vice counterparts. While the carrying cost of empty interviewing stations is relatively low, the cost of interviewer recruiting, hiring, training, and "learning curve" — along with excess supervision that one often carries during slow periods — is high. Phone centers that can avoid the worst peaks and valleys have lower costs than those that can't. I'll talk more about strategies for reducing the inconsistency of your workload later in this column.

If you get both inside and outside bids on the same projects to see whether your internal facility is cost-competitive, be sure that you have captured all internal costs in your inside bid, and that the assumptions about the current year's volume that went into determining your inside prices are realistic. When you get inside and outside bids regularly, track them in a spreadsheet to see how your cost competitiveness changes over time.

Quality

Phone interviewing quality is affected by many factors. The values and attitudes of top and middle management are key. These determine the emphasis placed on interviewer selection, training, and monitoring. The geographic location of the phone center determines the workforce it can draw on, and the starting and top pay rates affect who it can attract and retain. The type of work a center does is important as well: if interviewers and supervisors are accustomed to work that is difficult and demands high skill, they will be better on jobs requiring that skill than people who do mostly simple, straightforward studies. Finally, the organization's technical skill affects quality. If questionnaire programming, sample management, supervisory tools, and technical infrastructure are not set up properly, even good interviewers can't produce their best work.

Does it follow from this that you can get the best quality by doing the work yourself so that you can control each of these variables? Not necessarily! Here's why:

• Unless you have the resources to open and manage a facility anywhere in the U.S. or Canada, you are limited by your geographical range and, thus, the interviewer pool in that area.

• While your organization's values may reinforce quality, you may not have the operational expertise to hire people and develop procedures that deliver this quality.

• Even for quality-oriented research companies, cost is very important — and quality costs money. If you can't run a center with high efficiency, you won't have the dollars available to pay the rates needed to get and keep the best interviewers. Likewise, you won't have the budget for adequate training and monitoring.

• If your interviewing volume is all peaks and valleys, you will have a harder time producing quality work. During the slow periods you will lose high-performing people who need regular work and can get it elsewhere. During the peaks everyone will be under great pressure for production and quality may suffer.

I believe that doing your own telephone data collection does not necessarily assure higher quality. If your values, skills, workload, and geography are all favorable, you'll do excellent work. If all of these stars are not in alignment, your work may not be better than that of potential subcontractors.

There is one big quality benefit to doing the interviewing in-house. While you may not have complete control over the phone center's overall quality (for the reasons just mentioned), you do have complete control over who works on each project. There is huge variation in quality between the top and bottom quintile in nearly all phone center interviewing staffs. If you own the facility, you can be sure that the best people are put on the studies that most need them. If you don't, the needs of other clients and the budget and schedule requirements of their jobs will compete with yours.

In part two next month, we will conclude by looking at the roles that scheduling control and technology should take in your decision-making. [Q]

Data Use

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response base there usually is marginal violation of the implied assumptions; the data approaches a normal distribution and homogeneity of variance. But is this always the case? Depending on the response scales used, more likely not; there is some violation we could overlook. I am not suggesting that we have done a bad job, we just haven't done an appropriate job for the data's characteristics.

Back to the statement: "I can't afford the research plan you advise! Is there a way we can do fewer surveys but still get usable and reliable results?" Not to worry. There are alternatives available that are often overlooked. These approaches fall into the general category of sturdy or distribution-free statistics or, more specifically, nonparametric statistics.

Sturdy statistics

Most market researchers automatically use procedures that assume that the measurements are drawn from a normal distribution and then proceed to test hypotheses on parameters such as the mean or the variance (usually the standard deviation, which is the square root of the variance). Useful tests include but are not limited to the Student's t or the Z statistic, various forms of regression analysis, and/or analysis of variance to help understand a study's result and/or differences between product or control/treatment sets. These tools are a part of what is called parametric statistical tests.

While some of these statistical tests do work well even if the assumption of normality is violated, extreme violations of this assumption can affect the interpretation of the results. There are technical reasons behind this, such as the fact that the effect of violating the assumption of normality is to decrease the Type I error (a conclusion is drawn that the null hypothesis is false when, in fact, it is true), but that is beyond the scope of our intent here.

If a violation of an assumption is realized, or, as is often the case, if the sample size desired for the analysis base is small, e.g., under 20 or 30 observations — when "traditional" statistical tests become questionable, there is a collection of tests that do not depend that much on the precise shape of the distribution. This class of statistical tests bases themselves on the signs of differences, ranks of measurements, and/or counts of objects falling into categories. Such methods may not rest heavily on the specific parameters of the distribution, and for this reason are called nonparametric or distribution-free tests. They do not make any or as stringent assumptions about the distribution from which the numbers were sampled.

However, the term nonparametric is somewhat misleading, since these statistics do in fact deal with parameters such as the median of a distribution or the probability of success p in a binominal distribution. The main advantage to many of the methods described herein is that they defend themselves against distribution outliers and "off normal distributions" and failures of assumptions. Statisticians use adjectives such as "robust," "resistant" and "sturdy" to describe them.

Specifically, and more importantly, sturdy statistical techniques provide comparable test results to traditional tests when the samples are from asymmetric or skewed distributions. Here the term "power" is usually introduced. While there are transformations available such as taking logarithms or square roots of the data to bring them more in line with appropriate parametric assumptions, sturdy or distribution-free tests are a worthwhile alternative.

Further, sturdy statistical methods are useful in cases when the researcher knows nothing about the parameters of the variable of interest in the population (hence the name nonparametric).

A comparison

This section provides a comparison between tests in these two classifications (called parametric and nonparametric in the table) based on some popular study scenarios. It is not meant to be all-inclusive.

Most parametric tests have their nonparametric analogues. In other words, nonparametric tests exist for most situations a market analyst commonly uses: two independent groups, two matched groups, and multiple groups. The primary difference is that the data is no longer interval; instead it is ordinal (or is treated as ordinal). The table summarizes several "crossover" tools. It offers a very simple comparison between several parametric tests

Parametric Tests	Nonparametric Tests
Independent t-Test	• Mann-Whitney • Median
Matched Pairs t-Test	• Wilcoxon • Sign Test
One-Way ANOVA	• Kruskal-Wallis

with their analogues.

While nonparametric tests make fewer assumptions regarding the nature of distributions, they are usually less powerful than their parametric counterparts. However, in cases where assumptions are violated and interval data is treated as ordinal, not only are nonparametric tests more proper, they can also be more powerful.

This section highlights the applicability of the nonparametric tests noted above. For more detailed information the reader is directed to a statistical resource, the Internet, or software packages such as (but certainty not limited to) SPSS, SAS, and Prophet. (The author is not endorsing any of these packages, and no rank order is implied.)

• The Mann-Whitney U test is the most popular of the two-independent-samples tests. It is equivalent to the Wilcoxon rank sum test and the Kruskal-Wallis test for two groups. Mann-Whitney tests whether two sampled populations are equivalent in location. The observations from both groups are combined and ranked, with the average rank assigned in the case of ties. The number of ties should be small relative to the total number of observations. If the populations are identical in location, the ranks should be randomly mixed between the two samples. The number of times a score from Group 1 precedes a score from Group 2 and the number of times a score from Group 2 precedes a score from Group 1 are calculated. The Mann-Whitney U statistic is the smaller of these two numbers.

• The Median test tests whether two or more independent samples are drawn from populations with the same median using the chi-square statistic. This test should not be used if any cell has an expected frequency less than one, or if more than 20 percent of the cells have expected frequencies less than five.

• The Wilcoxon test is used with two related variables to test the hypothesis that the two variables have the same distribution. It makes no assumptions about the shapes of the distributions of the two variables. This test takes into account information about the magnitude of differences within pairs and gives more weight to pairs that show large differences than to pairs that show small differences. The test statistic is based on the ranks of the absolute values of the differences between the two variables.

• The Sign test is designed to test a hypothesis about the location of a population distribution. It is most often used to test the hypothesis about a population median, and often involves the use of matched pairs, for example, before and after data, in which case it tests for a median difference of zero. In many applications, this test is used in place of the one sample t-test when the normality assumption is questionable. It is a less powerful alternative to the Wilcoxon signed ranks test, but does not assume that the population probability distribution is symmetric. This test can also be applied when the observations in a sample of data are ranks; that is, ordinal data rather than direct measurements.

• The Kruskal-Wallis test is used to test the null hypothesis that "all populations have identical distribution functions" against the alternative hypothesis that "at least two of the samples differ only with respect to location (median), if at all." It is the analogue to the F-test used in analysis of variance. While analysis of variance tests depend on the assumption that all populations under comparison are normally distributed, the Kruskal-Wallis test places no such restriction on the comparison. It is a logical extension of the Wilcoxon-Mann-Whitney test.

• The Spearman Rank Correlation Coefficient bases itself on the rank ordering of each variable. It may also be a better indicator that a relationship exists between two variables when the relationship is non-linear.

• Kendall's tau-b is a measure of association for ordinal or ranked variables that takes ties into account. The sign of the coefficient indicates the direction of the relationship, and its absolute value indicates the strength, with larger absolute values indicating stronger relationships.

Validate, validate, validate

While in most cases, we are able to be "traditional," there are alternatives if the situation warrants. Regardless, the analyst has a basic responsibility: validate, validate, validate, and then analyze and interpret with confidence.

Names of Note

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members and 2002 officers for its commission on public relations measurement and evaluation. Newly elected members to the commission are **Dennis Bender**, senior vice president, communications, Habitat for Humanity International; **Fraser Likely**, president, Likely Communication Strategies, Ltd., Canada; **Tom Nicholson**, director, public relations and communications, Sears, Roebuck & Co.; and **Don Stacks**, professor, advertising and public relations, University of Miami. **Katharine Paine**, president and CEO of K.D. Paine & Partners, has been re-elected chair of the commission.

WPP has named account planner **Jon Steel** to a new worldwide consultancy position where he will interact with group companies and their clients. Steel was most recently a partner and vice chairman at Goodby, Silverstein & Partners in San Francisco.

Walker Information, Indianapolis, has promoted **Sonya McAllister** to senior vice president of business development and named **Cecilia Richmond** and **Christy Hirsch** vice president of business development.

Ryan Zaar has been promoted to field manager/brand analyst at the Milwaukee office of *Cramer-Krasselt* advertising.

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Global Qualitative Group, LLC (GQG)
Knowledge Systems & Research, Inc.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Marketing Advantage Rsch. Cnslts.
MCC Qualitative Consulting
The Research Department
Jay L. Roth Associates, Inc.

TELECONFERENCING
Cambridge Research, Inc.
Leichliter Ascts. Mkt. Rsch/Idea Dev.

TELEPHONE FOCUS GROUPS
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Market Navigation, Inc.
MedProbe, Inc.
Millennium Research, Inc.

TOURISM/HOSPITALITY
Image Engineering, Inc.
Leflein Associates, Inc.

TOYS/GAMES
C&R Research Services, Inc.
Fader & Associates

TRANSPORTATION SERVICES
Low + Associates, Inc.
Strategic Focus, Inc.

TRAVEL
Cambridge Associates, Ltd.
Image Engineering, Inc.
James Spanier Research

UTILITIES
Cambridge Associates, Ltd.
Competitive Edge
Knowledge Systems & Research, Inc.
Jay L. Roth Associates, Inc.
Turnstone Research, Inc.

VETERINARY MEDICINE
FOCUSED Marketing Research, Inc.
Paul Schneller Qualitative LLC

WEALTHY
Leflein Associates, Inc.

YOUTH
IC&R Research Services, Inc.
Image Engineering, Inc.
Leflein Associates, Inc.

QUIRK'S Marketing Research Review

2002 Telephone Facilities Directory

The 2002 Directory of Telephone Interviewing Facilities was compiled by sending listing forms to firms we identified as having permanent telephone interviewing facilities. This year's directory lists over 750 firms, arranged geographically. In addition to the company's vital information, we've included a line of codes showing the number of interviewing stations, the number of stations that use computer-aided interviewing (CATI), and the number of stations that can be monitored on-site and off-site.

NEW for 2002 – to make the directory easier to use, we've included a company alphabetic cross-index.

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

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

Alabama

Birmingham

Connections, Inc.
3928 Montclair Rd., Suite 230
Birmingham, AL 35213
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Fax 205-868-4173
E-mail: bvwconnect@mindspring.com
www.connectionsresearch.net
Rebecca V. Watson, President
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Graham & Associates, Inc.
3000 Riverchase Galleria, Suite 310
Birmingham, AL 35244
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Fax 205-443-5389
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www.grahammktres.com
Cindy Eanes, Vice President
30-15-30-30

New South Research
3000 Riverchase, Suite 405
Birmingham, AL 35244
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Fax 205-443-5340
E-mail: jjager@newsouthresearch.com
www.newsouthresearch.com
Jim Jager, President
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The Parker Group, Inc.
468 Palisades Blvd.
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Fax 205-868-1710
E-mail: tpggroup@aol.com
www.the-parker-group.com
160-160-160-160

Mobile

Research Strategies, Inc.
P.O. Box 190666
Mobile, AL 36619-0666
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Fax 251-660-2918
E-mail: rsincorp@bellsouth.net
Patricia Rhinehart, Vice President
25-25-25-0

Alaska

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www.craciun.com
Linda Boochever
12-12-12-0

Arizona

Flagstaff

Social Research Laboratory
Northern Arizona University
Box 15301
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Fax 928-523-6654
E-mail: Fred.Solop@nau.edu
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Fred Solop, Director & Professor
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Phoenix

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8687 E. Via de Ventura
Scottsdale, AZ 85258
Ph. 480-483-2700
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www.acsinfo.com
Lucy Haydu
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(See advertisement on p. 51)

Arizona Market Research Services
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10220 N. 31st. Ave., Suite 122
Phoenix, AZ 85051-9562
Ph. 602-944-8001
Fax 602-944-0130
E-mail: azmktres@worldnet.att.net
www.ruthnelsonresearchsvcs.com
Lincoln Anderson, Manager
20-0-20-1

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-field.com
www.brc-field.com
Earl de Berge, Research Director
49-49-49-49

Creative Consumer Research
500 W. Broadway, #102
Tempe, AZ 85282
Ph. 480-557-6666
Fax 480-557-6534
E-mail: ccrphnx@aol.com
Yvette Cave, Branch Manager
30-15-30-15

Datacall, Inc.
8055 N. 24th Ave., #111
Phoenix, AZ 85021
Ph. 602-864-0017 or 602-687-2500
Fax 602-864-0029
E-mail: shelley@data-call.com
Shelley Thompson, Sr. Vice President
40-40-40-40

Focus Market Research, Inc.
Camelback Executive Park
6991 E. Camelback Rd., Suite D118
Phoenix, AZ 85251
Ph. 480-874-2714
Fax 480-874-1714
E-mail: phoenix@focusmarketresearch.com
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Ray Opstad, General Manager
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Friedman Marketing Services
Phoenix Field/Phone
1647-A W. Bethany Home Rd.
Phoenix, AZ 85015
Ph. 602-242-6617 or 914-698-9591
Fax 602-242-6534
E-mail: gvigeant@roper.com
www.friedmanmktg.com
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O'Neil Associates, Inc.
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412 E. Southern Ave.
Tempe, AZ 85282
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Fax 480-967-6171
E-mail: surveys@oneilresearch.com
www.oneilresearch.com
Michael J. O'Neil, Ph.D., President
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PGM Incorporated
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Fax 801-434-7304
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www.pgmincorporated.com
Robert E. Higginson, V.P./Client Relations
24-24-24-24

Research International USA - Phoenix Office
8800 N. 22nd Ave.
Phoenix, AZ 85021-4258
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Response Research
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Nathan Forman, General Manager
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Strictly Medical

Strictly Medical Market Research
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Fax 602-224-7988
E-mail: tntwwalker@aol.com
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Fax 520-751-0918
E-mail: jpetrillo@cpisurveys.com
Jim Petrillo, President
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Ashton McMillan, Field Director
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ORC International
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Warren Frankel
165-165-165-165

Parker Consulting, LCC
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Tony Parker, Owner
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www.phonesolutions.com
Mike Schlegel or April White
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Craig Cunningham, President
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Sandy Houser, Dir. Interviewing Operations
50-50-50-50

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California

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Fax 559-252-8343
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www.aismarketresearch.com
Jennifer Nichols, Manager
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Patrick Bartels, Vice President
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Fax 559-226-9354
E-mail: fresno@nicholsresearch.com
www.nicholsresearch.com
15-8-10-0

Los Angeles
(See also Orange County)

Applied Research - West, Inc.
11021 Winners Circle, Suite 208
Los Alamitos, CA 90720-2821
Ph. 800-493-1079 or 562-493-1079
Fax 562-493-6535
E-mail: akantak@appliedmktresearch.com
www.appliedmktresearch.com
Dr. Anita Kantak, Principal
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Area Phone Bank
3419 Burbank Blvd.
Burbank, CA 91505
Ph. 818-848-8282 or 800-272-1272
Fax 818-846-9912
E-mail: Goldbaumer@earthlink.net
Ed Goldbaum, Owner
20-0-20-0

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California Survey Research Services, Inc.
15350 Sherman Way, Suite 480
Van Nuys, CA 91406
Ph. 818-780-2777
Fax 818-780-0329
E-mail: kgross@calsurvey.com
www.calsurvey.com
Ken Gross, President
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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
250-250-250-250

Consumer Pulse of Los Angeles
Galleria at South Bay, #269
1815 Hawthorne Blvd.
Redondo Beach, CA 90278
Ph. 310-371-5578 or 800-336-0159
Fax 310-542-2669
E-mail: losangeles@consumerpulse.com
www.consumerpulse.com
Angie Abell, Director
20-12-20-20

Davis Research, LLC
23801 Calabasas Rd., Suite 1036
Calabasas, CA 91302
Ph. 818-591-2408
Fax 818-591-2488
E-mail: info@davisresearch.com
www.davisresearch.com
Bill Davis, Partner
100-100-100-100
(See advertisement on p. 87)

The Dohring Co., Inc.
412 W. Broadway, 3rd fl.
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Ph. 800-242-8022
Fax 818-242-3975
E-mail: info@dohring.com
www.dohring.com
40-0-40-40

Envoy
(a subsidiary of Maritz Research)
Los Angeles Survey Center
3901 Via Oro Ave., Suite 200
Long Beach, CA 90810
Ph. 310-525-1300
Fax 310-525-1451
E-mail: postmaster@yourenvoy.com
www.yourenvoy.com
Chris Gerth, Branch Manager
220-220-220-220
(See advertisement on p. 109)

Field Dynamics Marketing Research
17547 Ventura Blvd., Suite 308
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Fax 818-905-3216
E-mail: fielddynam@aol.com
www.fielddynamics.com
Tony Blass, President
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Garcia Research Associates, Inc.
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E-mail: info@garciaresearch.com
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Carlos Yanez, Project Director
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E-mail: info@hmr-research.com
www.hmr-research.com
Amy Siadak
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Interviewing Service of America, Inc.
15400 Sherman Way, Suite 400
Van Nuys, CA 91406-4211
Ph. 818-989-1044
Fax 818-756-7489
E-mail: mhalberstam@isacorp.com
www.isacorp.com
Michael Halberstam, President
200-200-200-200
(See advertisement on p. 89)

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

1. STATIONS - No. of interviewing stations at this location
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Interviewing Service of America, Inc. - Alhambra
200 S. Garfield Ave., Suite 302
Alhambra, CA 91801
Ph. 818-989-1044
Fax 818-782-1309
E-mail: mhalberstam@isacorp.com
www.isacorp.com
Michael Halberstam, President
60-60-60-60
(See advertisement on p.89)

Interviewing Service of America, Inc. - Lancaster
639 West Ave. L-14
Lancaster, CA 93534
Ph. 661-726-9480
Fax 661-726-9580
E-mail: msullivan@isacorp.com
www.isacorp.com
Michael Halberstam, President
60-60-60-60
(See advertisement on p. 89)

L.A. Focus
The Focus Network
17337 Ventura Blvd., Suite 301
Encino, CA 91316
Ph. 818-501-4794
Fax 818-907-8242
E-mail: info@lafocus.net
www.thefocusnetwork.com
Lisa Balelo or Wendy Feinberg, Partners
22-0-22-0

Marylander Marketing Research, Inc.
16055 Ventura Blvd., Suite 820
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Ph. 818-990-7940
Fax 818-990-5106
E-mail: howard@marylander.com
www.marylander.com
Howard Marylander, President
11-0-11-11

Meczka Marketing/Research/Consulting, Inc.
5757 W. Century Blvd., Lobby Level
Los Angeles, CA 90045
Ph. 310-670-4824
Fax 310-410-0780
E-mail: adiaz@mmrcinc.com
www.mmrcinc.com
Dona H. Browne, Vice President
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MSI International, Inc.
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www.msiinternational.com
60-60-60-60

Qualitative Insights
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Jennifer von Schneidau, V.P./G.M.
25-0-25-0

The Research Line
Div. of C.A. Walker & Assoc., Inc.
11631 Victory Blvd., Suite 207
North Hollywood, CA 91606
Ph. 323-850-6820
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E-mail: info@cawalker.com
www.cawalker.com
Samuel Weinstein, President/COO
85-85-85-85

Schlesinger Associates West, Inc.
3330 Cahuenga Blvd., Suite 301
Los Angeles, CA 90067
Ph. 323-876-9909
Fax 323-876-9884
E-mail: LA@schlesingerassociates.com
www.schlesingerassociates.com
Debra S. Hellman, Exec. Vice President
14-0-14-14
(See advertisement on p. 9)

Orange County
(See also Los Angeles)

Ask Southern California, Inc.
City View Office Plaza
12437 Lewis St., Suite 100
Garden Grove, CA 92840
Ph. 714-750-7566 or 800-644-4ASK
Fax 714-750-7567
E-mail: Jennifer@asksocal.com
www.asksocal.com
Jennifer Kerstner, President
27-0-27-0

Assistance In Marketing/Los Angeles, Inc.
949 S. Coast Dr., Suite 525
Costa Mesa, CA 92626
Ph. 714-755-3900
Fax 714-755-3930
E-mail: aimla@aol.com
www.aimla.com
Cindi Reyes, Manager
23-0-0-0

Cheskin
Multicultural Research Center
1540 E. First St., Suite 200
Santa Ana, CA 92701
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Fax 714-560-1121
E-mail: agraves@cheskin.com
www.cheskin.com
Angelica Graves
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The Gallup Organization - Irvine
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240-240-240-240

Inquire Market Research, Inc.
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Barbara Foster, Principal
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The Question Shop, Inc.
2860 N. Santiago Blvd., Suite 100
Orange, CA 92867
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Fax 714-974-6968
E-mail: info@thequestionshop.com
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Elaine Hoffman, President
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E-mail: edj@field.com
www.field.com
E. Deborah Jay, President/CEO
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Ph. 916-440-8777
Fax 916-440-8787
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Joey Harmon, Vice President
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Joyce Revlett, Director of Surveys
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Fax 619-299-5888
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David Phife, President
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Joan Pietila, President
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Fax 858-573-0538
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www.jagorda.com
Gerald Jagorda, President
16-0-16-0

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

1. STATIONS - No. of interviewing stations at this location
2. CATI - No. of stations using computer-aided interviewing
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San Diego Surveys, Inc.
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San Francisco Bay/San Jose Area

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San Rafael, CA 94901
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Fax 415-345-9609
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Veronica Raymonda, Rsch. Ops. Mgr.
33-33-33-33
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The Research Spectrum
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E-mail: rhs@researchspectrum.com
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Rick Snyder, CEO
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Cindy Robinett, Director
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Jeff Davis, Director
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Deborah Leaper, Facility Director
14-0-14-14
(See advertisement on p. 9)

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E-mail: peterm@issans.com
www.issans.com
Peter McGuinness, President
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(See advertisement on p. 136)

Profile Marketing Research, Inc.
4020 S. 57th Ave., Suite 101
Lake Worth, FL 33463
Ph. 561-965-8300
Fax 561-965-6925
E-mail: profile@profile-mktg-res.com
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Judy A. Hoffman, President
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SIL Group
413 N.E. Third St.
Delray Beach, FL 33483
Ph. 800-626-5421 or 800-229-4921
Fax 800-599-5688
E-mail: sil@silgroup.net
www.silgroup.net
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Georgia

Athens

Compass Marketing Research
345 W. Hancock
Athens, GA 30601
Ph. 800-627-7667
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E-mail: info@cmrcompass.com
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Scott Taylor, Vice President
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Atlanta

Booth Research Services, Inc.
1120 Hope Rd., Ste., 200
Atlanta, GA 30350
Ph. 770-992-2200 or 800-727-2577
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Ted Finlay, Sr. Account Manager
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Data Research Services
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Jon A. Mitchell, Exec. Vice President
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The Gallup Organization - Atlanta Downtown
303 Peachtree St. N.E.
One Peachtree Center, 27th fl.
Atlanta, GA 30308
Ph. 404-525-9930
Fax 404-525-8645
www.gallup.com
150-150-150-150

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

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

IMAGES Market Research
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Deborah White, Director of Field Services
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Jackson Associates, Inc.
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Margaret Hicks, President
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Carrie Skinner
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Jeffre Lorver, Sr. Operations Manager
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Lynn Raub or Issaac Simpson
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Schlesinger Associates Atlanta, Inc.
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5909 Peachtree Dunwoody
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Stephenie Gordon, Facility Director
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(See advertisement on p. 9)

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Dydra H. Virgil, Principal
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Whaley Research & Associates, Inc.
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E-mail: wra@bellsouth.net
Marilynn Whaley, CEO
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Jon A. Mitchel, Exec. Vice President
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Jim Dannemiller, President
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Andrew Hayes, Brother & Partner
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775 Yellowstone Ave., #227
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Fax 208-232-1466
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Chris Mangelson, President
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Western Wats Center - B2C
250 S. Woodruff
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Peter Van Mondfrans
45-45-45-45
(See advertisement on p. 135)

Western Wats Center - B2C
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Pete Van Mondfrans
100-100-100-100
(See advertisement on p. 135)

Moscow

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Andrew Hayes, Brother & Partner
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Jeff Welch
50-50-50-50
(See advertisement on p. 135)

Twin Falls

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834 Blue Lakes Blvd. N., Suite 3A
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(See advertisement on p. 135)

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Andrea Weiner, Project Director
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www.acsinfo.com
Tony Pacenti
50-50-50-50
(See advertisement on p. 51)

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Universal City Professional Bldg.
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Cherlyn Robinson, Project Coordinator
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Consumer and Professional Research, Inc. (CPR)
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Peter Morich
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Consumer Pulse of Chicago
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424 Stratford Square
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Fax 630-894-9105
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www.consumerpulse.com
Steve Lehman, Director
9-4-9-9

Data Research, Inc.
1319 Butterfield Rd., Suite 510
Downers Grove, IL 60515
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Kathie Cowles, Exec. Vice President
50-17-20-20

DataPrompt International
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Chicago, IL 60601
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Marilyn Dent, Executive Director
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(See advertisement on p. 28)

Richard Day Research
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Evanston, IL 60201
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www.rdresearch.com
Richard Day, President
32-26-32-32

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Dimension Research, Inc.
200 W. 22nd St., Suite 240
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Fax 630-916-0836
E-mail: info@dimensionresearch.com
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Ava Powell, General Manager
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Discovery - National Qualitative Network
Chicago Focus & Field
3615 Park Dr., Suite 101
Olympia Fields, IL 60461
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www.discoverynqn.com
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Elrick & Lavidge
Three Westbrook Corp. Center, 6th flr.
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FFR
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Fact Flow Research
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Diana Manos, Mgr. New Business Development
23-23-23-23

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Mary Pedersen, Manager
100-100-100-100
(See advertisement on Back Cover)

Focuscope, Inc.
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Oak Park, IL 60301
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Kevin Rooney, Vice President
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Inform Research & Marketing
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Warren Frankel
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Peryam & Kroll Marketing and Research Corp.
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Precision Research, Inc.
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30-6-30-30
(See advertisement on pp. 47, 101)

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Dan Andrews, Facility Director
16-0-16-16
(See advertisement on p. 9)

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Strictly Medical

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Larry Kaplan, CEO
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Carol M. Sidel, Qual. Account Manager
Van Pitts, Manager Phone Services
6-0-6-0
(See advertisement on p. 90)

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4. OFF-PREMISES- No. of stations which can be monitored off-premises

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Nancy Matheis, President
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Indiana

Evansville

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Gary

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Janet Jackson, President
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Don Weston, President
30-30-30-30

MJM Research, LC
5700 Broadmoor, Suite 710
Mission, KS 66202
Ph. 913-384-9494
Fax 913-384-0476
E-mail: mike@mjmresearch.com
www.mjmresearch.com
Mike Heydman, Research Director
150-150-150-0

Kirksville

Envoy
(a subsidiary of Maritz Research)
Kirksville Survey Center
R.R. #3 Box 111A
Kirksville, MO 63501
Ph. 660-488-5500
Fax 660-488-6400
E-mail: postmaster@yourenvoy.com
www.yourenvoy.com
Janet Drummond, Branch Manager
84-84-84-84
(See advertisement on p. 109)

St. Louis

COMMUNICATIONS FOR RESEARCH, INC.

Communications For Research, Inc.
61 E. Hwy. 8
P.O. Box BF
Steelville, MO 65565
Ph. 573-775-4550
Fax 573-775-4560
E-mail: cfri@misn.com
www.cfrinc.net
Jim Steber, President
80-80-80-80

Consumer Opinion
10403 Clayton Rd.
St. Louis, MO 63131
Ph. 314-692-2686
Fax 314-692-2427
Kathleen Dunn, Manager
12-4-12-0

Consumer Opinion Council Research Center
200 S. Hanley, Suite 415
St. Louis, MO 63105
Ph. 314-863-3780 or 800-467-5959
Fax 314-863-2880
E-mail: ds@pragmatic-research.com
www.pragmatic-research.com
Douglas Sinnard, President
33-33-33-33

Fact Finders, Inc.
1852 Craig Park Ct.
St. Louis, MO 63146
Ph. 314-469-7373
Fax 314-214-4138
E-mail: factfinder@primary.net
www.ffinet.com
Timothy Caplinger, President
40-40-40-40

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

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

Marketeam Associates
1807 Park 270 Dr., Suite 300
St. Louis, MO 63146
Ph. 314-878-7667
Fax 314-878-6743
E-mail: vthies@doanemr.com
www.mkteam.com
60-60-60-60

Marketing Horizons, Inc.
1001 Craig Rd., Suite 100
St. Louis, MO 63146
Ph. 314-432-1957 or 800-669-0839
Fax 314-432-7014
E-mail: lwims@mhorizons.com
www.mhorizons.com
Loren Wims, Vice President
12-3-12-12

Marketing Horizons, Inc.-South
11166 Tesson Ferry
St. Louis, MO 63123
Ph. 314-432-1957
Fax 314-432-7014
E-mail: lwims@mhorizons.com
www.mhorizons.com
Loren Wims, Vice President
70-70-70-70

Peters Marketing Research, Inc.
12400 Olive Blvd., Suite 225
St. Louis, MO 63141-5437
Ph. 314-469-9022
Fax 314-469-7436
E-mail: amanda@petersmktg.com
www.petersmktg.com
18-18-18-18

The Planning Center
Richard Hunter Associates
7710 Carondelet, Suite 303
St. Louis, MO 63105
Ph. 314-727-8887
Fax 314-721-2011
E-mail: jhunter@brick.net
www.theplanningcenter.net
20-20-20-0

Pragmatic Research, Inc.
200 S. Hanley, Suite 420
St. Louis, MO 63105
Ph. 314-863-2800
Fax 314-863-2880
E-mail: ds@pragmatic-research.com
www.pragmatic-research.com
Doug Sinnard, President
33-33-33-33

Superior Surveys of St. Louis, Inc.
10403 Clayton Rd.
St. Louis, MO 63131
Ph. 800-325-4982 or 314-692-2699
Fax 314-692-2427
E-mail: SURVEYS4U@aol.com
Carol McGill, Partner
12-4-12-0

Westgate Research, Inc.
650 Office Pkwy.
St. Louis, MO 63141
Ph. 314-567-3333
Fax 314-567-7131
Germaine Eley, Vice President
60-48-60-48

Nebraska

Lincoln

The Gallup Organization
North American Operations Center
301 S. 68th St. Pl.
Lincoln, NE 68510
Ph. 402-489-9000
Fax 402-486-6560
www.gallup.com
184-184-184-184

Service Research Corporation
6201 S. 58th, Suite A
Lincoln, NE 68516
Ph. 402-434-5000
Fax 402-434-5006
E-mail: mbritten@serviceresearch.com
www.serviceresearch.com
Mike Briiten, President
22-0-22-22


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4. OFF-PREMISES- No. of stations which can be monitored off-premises

Wiese Research Associates, Inc.
1630 S. 70th St., Suite 100
Lincoln, NE 68506
Ph. 402-483-5054
Fax 402-483-5259
E-mail: gary_lorenzen@wraresearch.com
Gary Lorenzen, Exec. Vice President
54-24-54-54

Omaha

Midwest Survey & Research
9802 Nicholas St.
Omaha, NE 68114
Ph. 402-392-0755
Fax 402-392-1068
E-mail: worick@mwsurvey.com
www.mwsurvey.com
Dick Worick, President
30-30-30-30

Wiese Research Associates, Inc.
780 N. 114th St.
Omaha, NE 68154
Ph. 402-391-7734
Fax 402-391-0331
E-mail: mary_arkfeld@wraresearch.com
Tom Wiese, President
30-18-30-30

Wiese Research Associates, Inc.
401 Norfolk Ave.
Norfolk, NE 68701
Ph. 402-644-4444 or 402-391-7734 (Hq.)
Fax 402-644-4455
E-mail: mary_arkfeld@wraresearch.com
Tom Wiese, President
45-40-45-45

Nevada

Las Vegas

I/H/R Research Group
4440 S. Maryland Pkwy., Suite 203
Las Vegas, NV 89119
Ph. 702-734-0757
Fax 702-734-6319
E-mail: IHRRRA2@aol.com
www.ihr-research.com
Lynn Stalone, Partner
150-150-150-150
(See advertisement on p. 108)

Las Vegas Surveys, LLC
3405 S. Cambridge St.
Las Vegas, NV 89019
Ph. 800-797-9877 or 702-650-5500
Fax 702-650-0729
E-mail: ericsouza@lasvegassurveys.com
www.lasvegassurveys.com
Eric Souza, President
19-0-19-0

MRCGROUP
RESEARCH INSTITUTE

d/b/a MRCPhone
101 Convention Center Dr., Plaza 125
Las Vegas, NV 89109
Ph. 702-734-7511
Fax 702-734-7598
E-mail: research@mrcgroup.com
www.mrcgroup.com
Glynis Giangrande, Dir. of Client Services
200-200-200-200

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(See advertisement on p. 110)

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Reno

MarkeTec, Incorporated
P.O. Box 9058
Reno, NV 89507
Ph. 775-333-1221
Fax 775-333-1224
E-mail: kcole@marketecinc.com
Katherine Cole, President
7-0-4-0

ORC International
1170 Financial Blvd., Suite 500
Reno, NV 89502
Ph. 908-281-5100
Fax 908-281-5103
E-mail: orcinfo@prn.opinionresearch.com
www.opinionresearch.com
Warren Frankel
79-79-79-79

New Hampshire

Manchester/Nashua

New England Interviewing, Inc.
337 Amherst St.
Nashua, NH 03063-1723
Ph. 603-889-8222
Fax 603-883-1119
E-mail: newenglandint@cs.com
Joan Greene, President
14-0-14-0

New Jersey

Northeast Shore

Centrac, Inc.
112 Pavilion Professional Center
Brick, NJ 08723-7920
Ph. 732-920-0500
Fax 732-920-3896
E-mail: RLeeds@centracusa.com
www.centrac.com
Ron Leeds, President
100-100-100-100

Schulman, Ronca & Bucuvalas, Inc.
185 Monmouth Pkwy., Suite F
W. Long Branch, NJ 07764
Ph. 212-779-7700
E-mail: c.turakhia@srbi.com
www.srbi.com
Chintan Turakhia, Sr. Vice President
120-120-120-120

Northern New Jersey

Business Science International, Inc.
75 Oak St.
Norwood, NJ 07648
Ph. 201-871-0999
Fax 201-784-5775
E-mail: mail@bsiresearch.com
www.bsiresearch.com
45-25-45-25

Consumer Pulse of New York
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Paramus, NJ 07652
Ph. 201-909-0144
Fax 201-909-9877
E-mail: newyork@consumerpulse.com
www.consumerpulse.com
Liz Ellingsen, Manager
8-4-8-8

Focus World International, Inc.
146 Hwy. 34, Suite 100
Holmdel, NJ 07733
Ph. 732-946-0100
Fax 732-946-0107
E-mail: gary@focusworldint.com
www.focusworldint.com
Gary Eichenholtz, CEO/CFO
60-24-60-60

Harte-Hanks Market Intelligence
10 Elizabeth St.
River Edge, NJ 07661-1943
Ph. 800-456-9748
E-mail: research@harte-hanks.com
www.harte-hanks.com
40-40-40-40

Marketing Solutions Corporation
2 Ridgedale Ave., Suite 216
Cedar Knolls, NJ 07927
Ph. 973-540-9133 or 800-326-3565
Fax 973-540-9280
E-mail: MarketingSolutions@attglobal.net
www.marketingsolutionscorp.com
Jean Kelly, V.P. Field Director
40-30-40-40

Q Research Solutions, Inc.
Renaissance Corporate Center
3548 Rte. 9 S., 2nd fl.
Old Bridge, NJ 08857
Ph. 732-952-0000
Fax 732-952-0001
E-mail: maryanak@whoisq.com
www.whoisq.com
Maryana Kaplan, Sr. Dir. Rsch. Svcs.
75-75-75-75
(See advertisement on p. 111)

Schlesinger Associates, Inc.
Executive Plaza, Suite 400
10 Parsonage Rd.
Edison, NJ 08837
Ph. 732-906-1122
Fax 732-906-8792
E-mail: info@schlesingerassociates.com
www.schlesingerassociates.com
Steven Schlesinger, President
65-0-65-65
(See advertisement on p. 9)

Statistical Research, Inc.
111 Prospect St.
Westfield, NJ 07090
Ph. 908-654-4000
Fax 908-654-6498
E-mail: SRI@sriresearch.com
www.sriresearch.com
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Suburban Associates
579 Franklin Tpke.
Ridgewood, NJ 07450
Ph. 201-447-5100
Fax 201-447-9536
E-mail: info@subassoc.com
www.subassoc.com
Andrew Edwards
35-25-35-35

TechnoMetrica Market Intelligence, Inc.
690 Kinderkamack Rd., #102
Oradell, NJ 07649
Ph. 201-986-1288
Fax 201-986-0119
E-mail: mayur@technometrica.com
www.technometrica.com
Raghavan Mayur, President
30-30-30-30

TMR, Inc.
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Parsippany, NJ 07054
Ph. 973-829-1030
Fax 973-829-1031
E-mail: jwj@tmrinfo.com
www.tmrinfo.com
Jamie Jurgaitis, V.P./G.M.
50-50-50-50

THE WATS ROOM, INC.

The Wats Room, Inc.
18 Railroad Ave.
Rochelle Park, NJ 07662
Ph. 201-845-3100 or 800-724-0222
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180-180-180-180

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Princeton

NOP World – TIS Friedman
1060 State Rd.
Princeton, NJ 08540
Ph. 888-832-1532 or 609-921-3333
Fax 609-921-2611
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www.ropeaswr.com
Cheryl Schweitzer, Group Project Manager
400-400-400-400

The Olson Research Group, Inc.
Princeton Crossroads Corporate Center
300 Phillips Blvd., Suite 100
Ewing, NJ 08618
Ph. 609-882-9888
Fax 609-882-9826
E-mail: colson@olsonresearchgroup.com
www.olsonresearchgroup.com
Chip Olson, President
25-25-25-25
(See advertisement on p. 113)

Southern New Jersey
(See Philadelphia, PA)

New Mexico

Albuquerque

Sandia Market Research
2201 San Pedro N.E., Bldg. 1, Suite 230
Albuquerque, NM 87110
Ph. 800-950-4148 or 505-883-5512
Fax 505-883-4776
E-mail: laurie@nmia.com
Laurie Meyerer, General Manager
14-14-14-14

Santa Fe

Southwest Planning & Marketing
903 W. Alameda, #206
Santa Fe, NM 87501
Ph. 505-989-8500 or 800-989-9275
Fax 505-984-1393
E-mail: swpm@prodigy.net
www.swplanning-marketing.com
5-0-5-0

New York

Albany

Colwell & Salmon Communications, Inc.
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Albany, NY 12205
Ph. 800-724-5318 or 518-482-1596
Fax 518-482-1998
E-mail: jholland@colwell-salmon.com
www.colwell-salmon.com
Jen Holland, Market Research Manager
73-28-73-73

Colwell & Salmon Communications, Inc.
16 Pearl St.
Glens Falls, NY 12801
Ph. 518-745-6868
Fax 518-745-4470
E-mail: jholland@colwell-salmon.com
www.colwell-salmon.com
Jen Holland, Market Research Manager
34-24-34-34

PhoneSolutions, L.L.C.
433 State St., Suite 300
Schenectady, NY 12305
Ph. 518-346-6050
Fax 518-346-9346
E-mail: michael@phonesolutions.com
www.phonesolutions.com
Mike Schlegel, President
75-75-75-75

Buffalo

Buffalo Survey & Research, Inc.
1249 Eggert Rd.
Buffalo, NY 14226
Ph. 716-833-6639
Fax 716-834-6499
E-mail: buffalosur@aol.com
Jeanette Levin, President
8-0-8-0

Buffalo Survey & Research, Inc.
McKinley Mall
3701 McKinley Pkwy., Unit 124
Blasdell, NY 14219-2684
Ph. 716-822-3250
Fax 716-822-9691
E-mail: buffalosur@aol.com
David Levin, Vice President
6-0-6-0

Goldhaber Research Associates, LLC
One NFA Park
Amherst, NY 14228
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Fax 716-689-3342
www.goldhaber.com
Paulette A. Faraci, Dir. Client Services
17-17-17-17

ICT Research Services/VFIS
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Depew, NY 14043
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Fax 716-651-0473
E-mail: jprice@ictgroup.com
Judy Price, Vice President
120-120-120-120

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Buffalo, NY 14031
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Fax 716-634-9560
E-mail: mdgarup@aol.com
Arup Sen, President
15-15-15-15

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Buffalo, NY 14223
Ph. 716-876-6450
Fax 716-876-0430
E-mail: sservice@surveyservice.com
www.surveyservice.com
Susan R. Adelman, President
60-60-60-60
(See advertisement on p. 115)

New York City
(See also Northern New Jersey)

Beta Research Corp.
6400 Jericho Tpke.
Syosset, NY 11791
Ph. 516-935-3800
Fax 516-935-4092
E-mail: beta@nybeta.com
www.nybeta.com
Manny Mallo, President
25-20-25-0

Central Marketing, Inc.
30 Irving Place, 7th fl.
New York, NY 10003
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Fax 212-979-5647
E-mail: CMcma9@aol.com
Carol McMahon, Partner
90-50-90-90

Diversified Research, Inc.
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Irvington, NY 10533
Ph. 914-591-5440
Fax 914-591-4013
Michael La Velle, President
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Ebony Marketing Research, Inc.
2100 Bartow Ave., Suite 243
Bronx, NY 10475
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www.ebonymktg.com/
Bruce Kirkland, Vice President
90-0-90-0

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Fax 212-686-5114
E-mail: info@gazelleintl.com
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350-350-350-350

Informed Marketing Sources, Inc.
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Troy, NY 12180
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E-mail: info@informed-sources.com
Bob Kasper, Vice President
40-40-40-40

Innovative Concepts Marketing Research
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Scott Sycoff, Exec. Vice President
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(See advertisement on p. 117)

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New York, NY 10016
Ph. 212-213-3303
Fax 212-213-3554
E-mail: RLBIPC@aol.com
Rhoda Brooks, Partner
60-60-60-60
(See advertisement on p. 116)

MKTG, Inc.
200 Carleton Ave.
East Islip, NY 11730
Ph. 631-277-7000
Fax 631-277-7601
E-mail: howardg@mktginc.com
Howard Gershowitz, Exec. Vice President
220-220-220-220

MKTG, Inc.
100 Fire Island Ave.
Babylon, NY 11702
Ph. 516-277-7000
Fax 516-277-7601
E-mail: howardg@mktginc.com
Howard Gershowitz, Exec. Vice President
40-35-40-40

Opinion Access Corp.
31-00 47th Ave.
Long Island City, NY 11101
Ph. 718-729-2622 or 888-489-DATA
Fax 718-729-2444
E-mail: info@opinionaccess.com
www.opinionaccess.com
Joe Rafael, Chairman
200-200-200-200
(See advertisement on Inside Front Cover)

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Fax 631-435-3287
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Bob Magee, AVP Telephone Centers
400-400-400-400

Barbara Ruderman
211 W. Chester St.
Long Beach, NY 11561
Ph. 516-889-3559
E-mail: rudyj211@optonline.net
Barbara Ruderman
20-0-20-20

Schulman, Ronca & Bucuvalas, Inc.
145 E. 32nd St., Suite 500
New York, NY 10016
Ph. 212-779-7700
Fax 212-779-7785
E-mail: m.schulman@srbi.com
www.srbi.com
Chintan Turakhia, Sr. Vice President
300-300-300-300

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Seaport Surveys
Financial Focus, Inc.
135 William St., 5th fl.
New York, NY 10038
Ph. 212-608-3100 or 800-347-2662
Fax 212-608-4966
E-mail: Seaportand@aol.com
www.seaportsurveys.com
Andrea Waller, President
25-0-25-25

The Telephone Centre, Inc.
30-00 47th Ave., 4th fl.
Long Island City, NY 11101
Ph. 718-752-0300
Fax 718-752-1401
E-mail: afleischer@telectr.com
www.telectr.com
Adam Fleischer, Owner
150-150-150-150

U.S. Wats
29 W. 38th St., 10th fl.
New York, NY 10018
Ph. 212-819-1466
Fax 212-819-1813
E-mail: uswats@mindspring.com
Carol McDonald, Executive Director
50-35-46-46

Universal Survey Center
29 W. 38th St.
New York, NY 10018
Ph. 212-391-5243
Fax 212-391-5428
E-mail: mlefkowitz@universalsurvey.com
www.universalsurvey.com
Mike Lefkowitz, Exec. Vice President
175-175-175-175

Rochester

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Rochester, NY 14623
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E-mail: info@harrisinteractive.com
www.harrisinteractive.com/CM61
325-325-325-325
(See advertisement on Inside Back Cover)

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Fax 716-586-7508
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380-380-380-380

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Dewitt, NY 13214
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Fax 315-446-6719
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www.ksrinc.com
Joe Snyder, Dir. of Data Operations
100-100-100-100

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Utica, NY 13502
Ph. 315-624-0200
Fax 315-624-0210
E-mail: marketing@zogby.com
www.zogby.com
94-94-94-0

North Carolina

Charlotte

Consumer Pulse of Charlotte
Eastland Mall
5625 Central Ave.
Charlotte, NC 28212
Ph. 704-536-6067 or 800-336-0159
Fax 704-536-2238
E-mail: charlotte@consumerpulse.com
www.consumerpulse.com
Daniel Bashaw, Director
15-8-15-15

KPC Research
600 S. Tryon St.
Charlotte, NC 28202
Ph. 704-358-5757 or 800-852-2794
Fax 704-358-5745
E-mail: kpcresearch@charlotteobserver.com
www.kpcresearch.com
Jack Clark, Research Director
36-36-36-36

Leibowitz Market Research Associates, Inc.
3120 Whitehall Park Dr.
Charlotte, NC 28273-3335
Ph. 704-357-1961
Fax 704-357-1965
E-mail: info@leibowitz-research.com
www.leibowitz-research.com
Teri Leibowitz, President
15-10-0-0

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831 E. Morehead St., Suite 150
Charlotte, NC 28202
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Fax 704-332-0499
E-mail: nburnap@marketwise-usa.com
www.marketwise-usa.com
Nancy Burnap, Ph.D., Principal
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Winston-Salem, NC 27106
Ph. 336-896-2200
Fax 336-896-2201
E-mail: allpoints@allpointsresearch.com
www.allpointsresearch.com
Sherrie Aycock, Co-Owner
38-38-38-8

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2150 Country Club Rd., Suite 300
Winston-Salem, NC 27104
Ph. 800-443-7344
Fax 336-721-1597
E-mail: johnsessions@bellomyresearch.com
www.bellomyresearch.com
John Sessions or Carol Hefner
150-150-150-150

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1400 Westgate Center Dr., Suite 200
Winston-Salem, NC 27103
Ph. 336-765-1234
Fax 336-765-1109
E-mail: melissas@cbaresearch.com
Pam Knopf, V.P. Operations
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Survey Partners of America
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Winston-Salem, NC 27104
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Fax 336-721-1597
E-mail: carolhefner@bellomyresearch.com
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Carol Hefner
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Fax 336-574-3007
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Liz Winter, Owner
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Chapel Hill, NC 27516
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Dino E. Fire, General Manager
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Richard Harker, President
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Fax 513-489-9130
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Joan Feldon, President
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Jim Moler Jr.
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Patricia A. Calo, Vice President
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E-mail: cincinnati@consumerpulse.com
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Phil Blantley, Director
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Kathy Renaker, Account Executive
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Fax 513-679-5300
E-mail: ken@fieldsresearch.com
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Bernie Kearney, Vice President
27-27-27-27

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Judy George, Sr. Vice President
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M. Randall Thaman, President
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Barbara Smith, Field Service Director
25-25-25-25

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Fax 216-901-8085
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Amy Morris, Executive Director
12-3-10-0
(See advertisement on p. 121)

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Lauren Wagner, Mgr. Customer Relations
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Richard Stock, Director
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Libby Webster, Manager
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Linda Hagedorn, President
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Joyce Clevenger, Exec. V.P.
55-55-55-55

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Oklahoma

Oklahoma City

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Bohn Macrory
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Deanna Carter, Vice President
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Fax 918-665-3388
E-mail: djarrett@consumer-logic.com
www.consumer-logic.com
Dan Jarrett, President
38-28-28-28

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4. OFF-PREMISES- No. of stations which can be monitored off-premises

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Fax 918-338-0831
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www.on-linecom.com
Peggy O'Connor
180-180-180-180
(See advertisement on p. 122)

Oregon

Portland

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Jim Weaver, Manager
12-0-12-0
(See advertisement on p. 137)

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Lester Harman, Field Svcs Acct. Exec.
60-60-60-24
(See advertisement on p.75)

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Jackie Weise, Exec. Vice President
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Jeff Palish, Vice President
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Linda Zinck, Dir., Consumer Research
25-0-25-0
(See advertisement on p. 71)

Pennsylvania

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Greg Surovcik, Vice President
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Colleen Moore Mezler, President
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Eleanor Yates, Director
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Steve McFadden, President
285-285-285-285
(See advertisement on p. 43)

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(See advertisement on p. 123)

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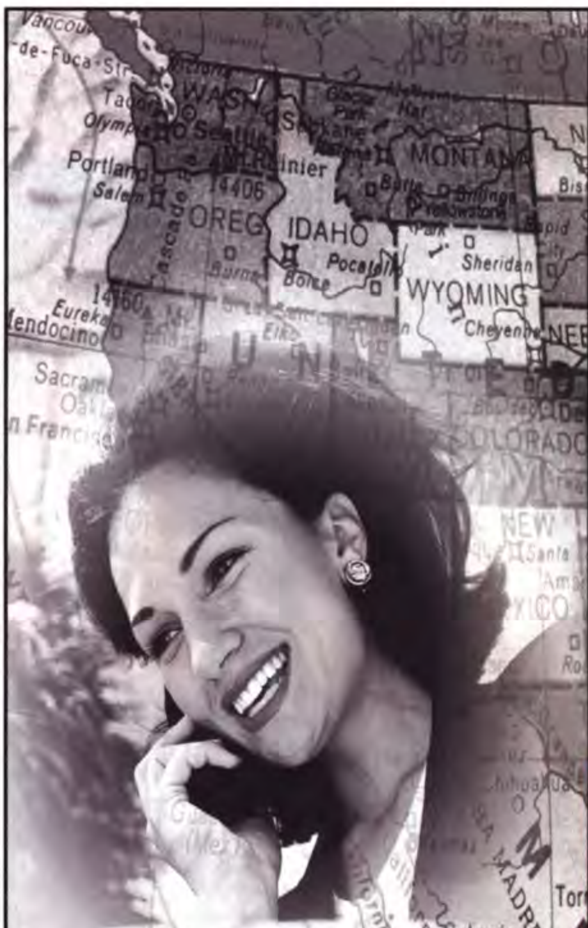

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Fax 801-379-4197
E-mail: jwelch@westernwats.com
www.westernwats.com
Jeff Welch
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Western Wats Center - Trax
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Ph. 801-374-0795
Fax 801-343-2500
E-mail: ajackson@westernwats.com
www.westernwats.com
Art Jackson
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(See advertisement on p. 135)

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Fax 801-343-2500
E-mail: ajackson@westernwats.com
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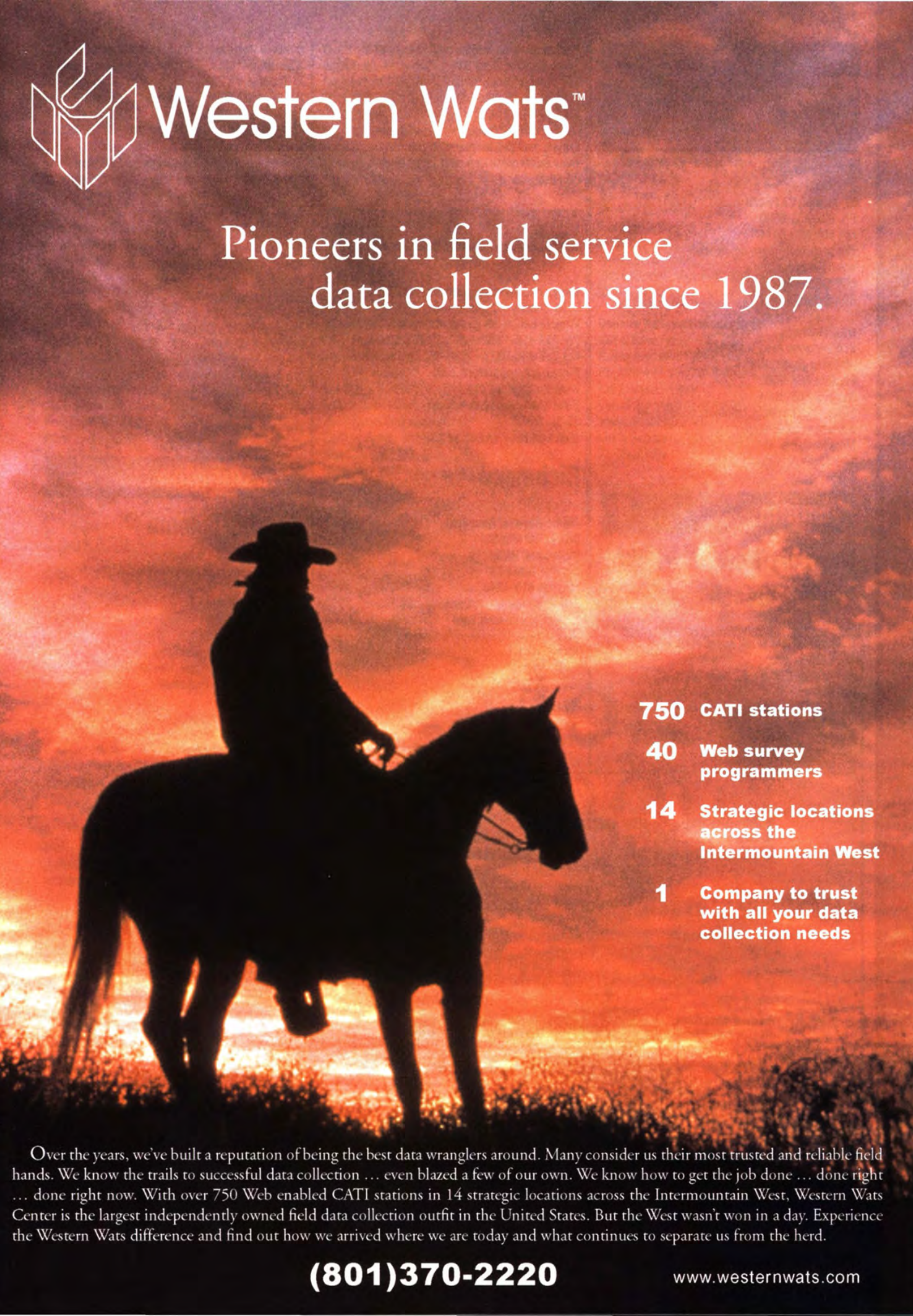
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Fax 757-456-0377
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www.issans.com
Peter McGuinness, President
35-35-35-35
(See advertisement on p. 136)

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Steve Shaw, Director of Research
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Lois Abernathy, Dir. Special Projects
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Fax 206-241-5213
E-mail: info@cosvc.com
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17-0-17-0
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Richard Secker, Director of Field Service
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(See advertisement on p. 138)

Consumer Pulse of Milwaukee
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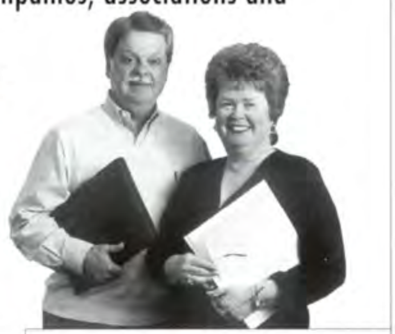

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(See advertisement on p. 135)

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

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4. OFF-PREMISES- No. of stations which can be monitored off-premises

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Trade Talk

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Sensations line of dishwashing liquid. It's really just nice-smelling dish soap but that's exactly why the line is so popular. After all, if you have to wash dishes, why not be surrounded by a pleasant fragrance?

Technology certainly plays a role in helping Colgate develop innovative products. For example, it makes new and different packaging possible — witness the animal figures floating in bottles of Softsoap Rainforest liquid hand soap. But while getting the figures into the soap containers was a technological marvel, Figura said, that's not what Colgate is selling. Rather, it's "selling fun." In other words, if there's a little fun involved in washing their hands, perhaps kids won't have to be dragged to the sink when it's time to clean up for dinner.

Of course, any firm can strive for innovation, but if that goal isn't supported throughout the company, new ideas never get off the drawing board. Figura said the commitment to innovation and belief in the value of consumer insights extends to Colgate senior management.

Figura offered a few other choice bits of advice during his presentation:

• Do not launch sub-optimal products, even if a lot of work has been put into them. Colgate has killed products that didn't live up to consumer expectations. The products may be new and different and the concept may have tested extremely well, but if the resulting product doesn't cut it, don't risk marketing it. A series of disappointing experiences with a company's brands can dissuade consumers from future trial.

• The marketing research function has to be flexible. It can't be viewed as a roadblock to the product development process.

• Consumers respond to signals — the goal is to make products that communicate relevant benefits.

• In Colgate-Palmolive's experience, ideation should be done quickly. Concepts should be readied in weeks instead of months.

• It's crucial to integrate the supply chain in new product efforts — an obvious point, but one Colgate learned the hard way: Figura told of the company having to fly 747s full of its 2in1 toothpaste from England to stock key U.S. suppliers.

• Encourage cross-category sharing of information, thinking, consumer insights, etc. An idea that works in one product area may also have applications in others.

Definite impact

Though they took different routes, Berger, Figura, and Shepard all made a similar point: when done right and backed up with company-wide commitment, marketing research (a.k.a. consumer insights) can have a definite impact on a company's bottom line. If you talk to your consumers, uncover their needs, and deliver products that truly meet those needs, you won't have to search for ROI. The evidence will be right there in your monthly sales figures.

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Trade Talk

By Joseph Rydholm, QMRR editor

ROI at the ARF

Slowly but surely, New York seems to be getting back to normal. At least it appeared that way to me during an April weekend spent traipsing around the City That Never Sleeps prior to the annual Advertising Research Foundation (ARF) conference at the New York Hilton.

The throngs of tourists have returned to Times Square, Yankee fans are heckling the opposition (if you can use that word to describe the Tampa Bay Devil Rays), and the same electronics stores that have been "going out of business" for the better part of a decade are still offering great deals.

Perhaps one of the surest signs that the city is ready to move on: commercial exploitation of 9/11. Every crummy little souvenir shop I poked my head into was stuffed to the gills with items bearing the initials FDNY. I guess I can understand putting those forever-poignant letters on baseball caps — wear the hat, pay a tribute — but embroidering them on sweatpants?

I also wondered what to think of the vendors who lined Fulton Street near Ground Zero selling identical sets of grainy color snapshots of the post-attack devastation. Some keepsake.

After visiting the observation platform and surveying the seemingly endless patchwork of heartbreaking poems, notes, photos, and other tributes to loved ones and total strangers alike, I was ready to focus on trivial things like marketing research.

Show was busy

The number of exhibitors at the ARF seemed to be down a bit this year, but the show floor was always busy (thanks, as always, to those of you who visited our booth) and the conference events I sat in on were well-attended.

My favorite session was a forum titled "How Research Pays Back." The talk was moderated by Bob Berger, vice president of consumer and market insights at Seagrams Spirits and Wine Group, who spoke about how his organization has reengineered the consumer insight function. He was followed by Jim Figura, vice president, consumer research, at Colgate-Palmolive, who gave way to Barry Shepard, vice president of Starkist Seafood Marketing, Heinz North America, and Susan Ashley, group vice president, global sales and service, The ARS Group.

It was energizing to hear Figura speak about the importance of consumer insights to Colgate and how they play a key role in the company's drive to capture shoppers' attention with a constant stream of new products. The drive seems to be working: 60 percent of Colgate's business in the U.S. comes from new products launched within the last five years, Figura said. And 80 percent of the firm's new products build volume after their first year on the market.

Opportunities for innovation

Product development is really about using consumer insights to uncover opportunities for innovation, a process Figura termed "finding the obvious." For example, consumers said dishwashing was a necessary but dull task. So why not liven it up a bit? Hence the Palmolive Spring

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