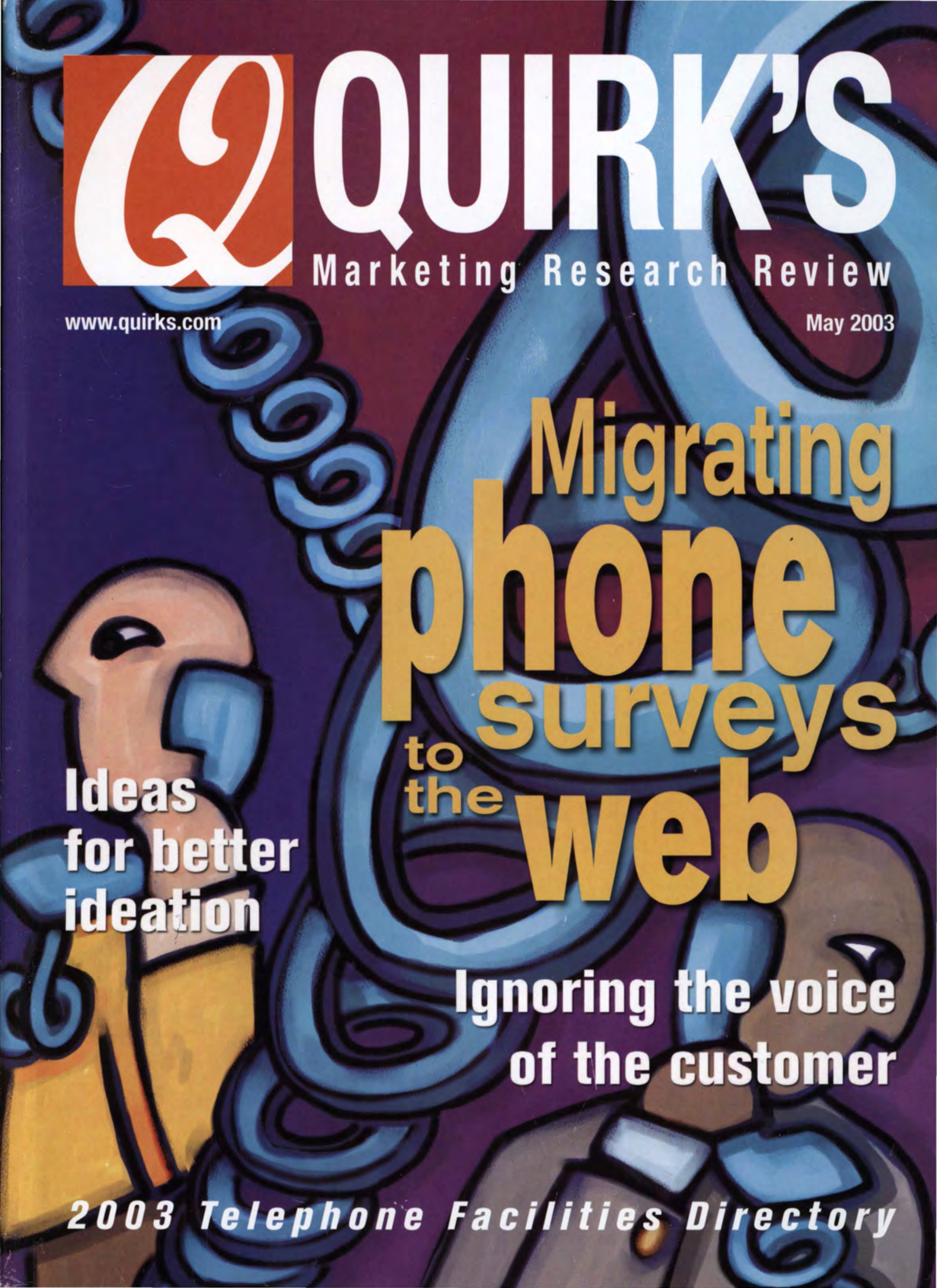

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Volume XVII Number 5 May 2003

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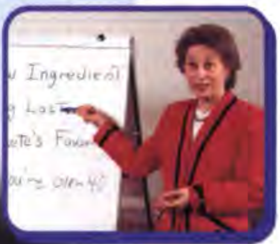

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Johnson & Johnson #1 in corporate reputation survey

In Harris Interactive's 2002 Reputation Quotient (RQ) survey, which measured the corporate reputations of the most visible companies nationwide, Johnson & Johnson placed first, while Harley-Davidson, new to the list, placed second. The study, which ranked 60 companies, also addressed the concepts of corporate sincerity, corporate citizenship and ethical standards.

Johnson & Johnson maintains its first-place ranking for a consecutive fourth year with an RQ of 82.14. J&J is now the only company measured in the annual RQ that has achieved an RQ exceeding 80 points each year.

Enron also sets the record for the lowest RQ ever recorded, at 26.22 in this survey.

Still ranked in the Top 10 were the Coca-Cola Company (3rd with an RQ of 78.95), Maytag Corporation (6th with an RQ of 78.50), and 3M Company (10th with an RQ of 77.90).

Companies new to the annual RQ placing in the Top 10 in their inaugural year — Harley Davidson (80.68), General Mills (78.61), and Eastman Kodak (78.46). The Home Depot returned to the Top 10 (8th spot with an RQ of 78.24). UPS (4th) and Dell (9th) — both measured in previous years - entered the Top 10 for the first time in 2002.

Microsoft has ranked first in the Financial Performance dimension in each year of the study. In addition, Microsoft ranks 1st this year in the Vision and Leadership dimension overall, as well as on each of the three attributes that comprise this dimension. No other company surveyed dominated any of the other five reputational dimensions as Microsoft dominated this one.

Johnson & Johnson has ranked first in Product & Services and Emotional Appeal each year.

Annual RQ 2002 Ranking

(Including 2002 rank and RQ score, and 2001 rank where applicable)

2002 Rank	2001 Rank	Company	2002 RQ	2002 Rank	2001 Rank	Company	2002 RQ
1	1	Johnson & Johnson	82.14	31	30	Nike	69.60
2	NA	Harley Davidson	80.68	32	25	General Motors	69.44
3	3	Coca-Cola	78.95	33	NA	JC Penney	69.26
4	15	United Parcel Service (UPS)	78.72	34	37	Unilever	68.95
5	NA	General Mills	78.61	35	23	Boeing	68.76
6	9	Maytag	78.50	36	35	Gateway	68.70
7	NA	Eastman Kodak	78.46	37	39	Apple	68.30
8	19	Home Depot	78.24	38	33	McDonald's	68.03
9	13	Dell	78.18	39	NA	American Express	67.57
10	5	3M	77.90	40	NA	Verizon	65.84
11	6	Sony	77.47	41	46	AT&T	65.25
12	8	FedEx	76.79	42	56	DaimlerChrysler	64.75
13	2	Microsoft	76.75	43	52	Ford	63.92
14	14	Procter & Gamble	76.67	44	NA	Merrill Lynch	63.72
15	11	Disney	76.18	45	45	Exxon Mobil	63.53
16	NA	PepsiCo	75.34	46	36	Citigroup	63.29
17	17	Wal-Mart	75.16	47	41/48	ChevronTexaco	62.73
18	16	Anheuser-Busch	74.85	48	NA	SBC	62.39
19	4	Intel	74.60	49	53	AMR (American Airlines)	59.57
20	12	General Electric	74.51	50	50	AOL/Time Warner	59.35
21	31	Xerox	73.33	51	44	Sprint	57.74
22	24	Southwest Airlines	73.29	52	59	Philip Morris	53.92
23	7	Hewlett-Packard	73.16	53	40	K-Mart	53.36
24	10	IBM	73.10	54	NA	Qwest	50.96
25	22	Honda	73.06	55	60	Bridgestone/Firestone	50.34
26	21	Target	72.95	56	NA	Adelphia	41.59
27	18	Toyota	72.85	57	NA	Andersen Worldwide	40.10
28	28	DuPont	70.98	58	58	WorldCom	37.03
29	38	Sears	70.90	59	NA	Global Crossing	33.37
30	20	Cisco Systems	70.38	60	NA	Enron	26.22

The majority of people perceived a year of reputation decline; nearly half (48 percent) said that the reputation of corporate America has declined "a lot" in the past year and another 31 percent said it has declined "a little." Only 14 percent saw stability, and even less than that (7 percent) reported seeing any improvement. When asked to characterize the reputation of corporate America today, less than 1 percent said "it's great" and only one in five (19 percent) said "it's good."

In an earlier study, the general public was asked to nominate companies with the "best" and "worst" reputations; the 60 companies with the most nominations were then measured in the Annual RQ 2002 survey to determine the rankings.

Enron was among the 14 companies new to the study, receiving the most nominations overall. Other notable

continued on p. 62

New York-based *CMR/TNS Media Intelligence* has named **Bev Andal** to the newly created position of chief operating officer.

Paul Root has been named chief marketing officer of the *Marketing Science Institute* (MSI), Cambridge, Mass., effective June 1. Root served as MSI president from 1990 to 1998.

Carol Hefner has been named president of *Survey Partners of America*, Winston-Salem, N.C.

Hefner

Britain's *Market Research Society* has named **Jennie Beck** chairman. She is director of *NFO Media*.

Information Resources, Inc., Chicago, has promoted **Neil Canter** to division president, analytic insights group, and **David Shanker** to division president, client service North America.

Greenwich, Conn.-based *NFO WorldGroup* has named **Lynd Bacon** executive vice president, business, product, and technology development.

C&R Research has named **Dick Chay** vice president, responsible for developing new business for the Chicago-based company.

St. Louis-based *Maritz Research* has formed a new group called Product Planning & Development. **Wally Balden** assumes the group's lead role as director of product planning and development. The new unit will be focused primarily on new product development, product management and portfolio management. Separately, **Keith Chrzan** has rejoined Maritz Research as director of marketing science.

Cleveland communications firm *Marcus Thomas LLC* has named **Edwige Winans** research project manager. In addition, **Kati Maloney-Davis** has been named research associate.

Winans

Gibbons

Walker Information, Indianapolis, has named **Patrick Gibbons** senior vice president of marketing and business development.

KLD Marketing Research, Inc., Valparaiso, Ind., has announced several promotions: **Jessica E. DeWitt** to senior project director; **Erin M. Venice** to project director; **Douglas Robertson** to senior project facilitator; **Amanda Piecuch** to project facilitator; and **Aaron Sullivan** to data collection facilitator.

New York-based *RoperASW* has named **Wayne Smith** vice president of its Roper/Langer Qualitative Division.

Harper, an Indianapolis-based pharmaceutical health care market research company, has named **Cindy Johnson** director of qualitative services

Scott Birkeland has joined *MRSI* (Marketing Research Services Inc.) as a statistical analyst at the company's headquarters in Cincinnati.

Bridgid Delgardio has been named facility director at the new *Focus Pointe* facility in Santa Monica, Calif. At the firm's suburban Philadelphia facility, **Jennifer Steinberg** has been named associate director.

At the Los Angeles office of *Interviewing Services of America*, **Dianna Rose** has been named senior project manager, **Benny Carrasco Jr.** has been named CATI programmer, and **Tracy Rutter** has been named data processing project manager. At the firm's Chicago office, **Karen Flannery** has been promoted to regional director, account services.

On-Line Communications, Inc., Bartlesville, Okla., has named **Ed Sugar** vice president of sales.


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Product & Service Update

Free report looks at research industry trends

Atlanta marketing research firms DialTek and Pioneer Marketing Research are offering free access to results from their 2003 Research Industry study at www.dialtek.com/index.asp?res=1024. The study, which examines trends in data collection in 2003, also gathered information on other issues affecting the research industry. Respondents to the e-mailed questionnaire answered questions on topics such as outsourcing, criteria for selecting a data collection method, and the provider selection process.

New interface from MSG, CfMC

Fort Washington, Pa.-based Marketing Systems Group (MSG) and Computers for Marketing Corporation (CfMC), San Francisco, have released a new interface between CfMC's WebCATI and the PRO-T-S researchPredictive Dialer. This interface allows interviewers, physically located away from the centralized interviewing facility, to operate as if they were in the facility itself. The interface uses a centralized Web-based interviewing system linked to a computerized dialing system.

Suitable for areas of the country where it is difficult to recruit interviewing staff to drive to a central location, this interface provides flexibility for both interviewers and call center managers. Interviewers can work for shorter and more varied periods of time, transforming "drive-time" to paid hours. For management, the pool of prospective qualified interviewers increases; expansion doesn't mean new booth construction; and no-show problems due to weather difficulties could be almost eliminated.

All sample control and dialing is centralized. Interviewers can be monitored from anywhere. And, audio recording options range from voice capture of selected segments/questions to full interview recording. The soon-to-be-released Digital Sound Management Plus (DSM+) module will allow for retrieval and playback of recordings for quality control, interviewer evaluation, and/or delivery to clients.

Operationally, an interviewer signs in at the WebCATI Web site, PRO-T-S then dials their phone — that connection is now just another telephone extension, just like any other station within the central facility, with the same PRO-T-S features and functionality. Not limited to just at-home interviewing, the solution can be implemented to service clusters of small call centers, or even a remote or "virtual" interviewing force. For more information contact MSG's Dan Bernard at 800-336-7674 or CfMC's Gene Filipi at 415-777-0470.

MapInfo updates Canadian products

MapInfo Corporation, Troy, N.Y., has announced an update to its demographic data for its core Canadian products, incorporating all available 2001 Census data from Statistics Canada. MapInfo's 2003 Estimates and Projections, Daytime Population, Consumer Expenditure Potentials and PSYTE Neighborhood Segmentation System will give users the most recent data available for fueling market potential studies, customer acquisition and target marketing campaigns and site location analysis.

MapInfo's Estimates and Projections Canada database incorporates Statistics Canada's 2001 Census data and is available on the new census geography. The new data enables marketers to identify the demographic trends and estimated market characteristics for the current year as well as projections across hundreds of variables for three, five and 10 years ahead. Some of the new variables added for the 2003 data include: household income distributions, total population age categories (both male and female) and 2001 adjusted Census population counts. For more information visit www.mapinfo.com.

MCAPI tool from Techneos, SPSS MR

An ongoing collaboration between Techneos Systems and SPSS MR has produced a solution for mobile collection of structured data. Techneos has released a new version of its Entryware Professional software that is integrated with the SPSS MR Dimensions Platform to create a scalable mobile computer-assisted personal interviewing (MCAPI) tool. It allows market researchers to utilize mobile data collection in situations where it is the most suitable method, and to include it in multimode interviewing systems.

Entryware Pro 4.0 has new features designed to make questionnaire design and data collection tasks easier for new users, and improve productivity for those with experience. Version 4 also works with the new Techneos Enterprise Server to provide Web-based questionnaire distribution, project management, and reporting of results for any number of handheld devices. Support for most double-byte character sets is now available, enhancing the software's ability to run multilingual questionnaires. For more information visit www.spssmr.com.

continued on p. 68

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Research Industry News

News notes

In response to press reports of its interest in acquiring the Interpublic Group's **NFO WorldGroup**, **Taylor Nelson Sofres** issued a statement in late March confirming that it was in discussions with Interpublic Group but offered no assurance that a transaction was forthcoming. Further, the company stated, "It is anticipated that any proposed acquisition would be funded primarily by debt and that any additional funding would not involve TNS making a rights issue to its shareholders. It should also be noted that the price currently under discussion is below the $500 million level quoted in previous press reports. TNS reconfirms its previously stated acquisition policy, that any acquisition should be earnings enhancing in the first full year of ownership."

Contemporary Research Centre, Montreal, has sold its Vancouver operation.

Acquisitions

Forrester Research, Inc., Cambridge, Mass., has completed its acquisition of **Giga Information Group**, Inc., a technology advisory firm. Giga will operate as a wholly-owned subsidiary of Forrester Research.

New York research firm **FIND/SVP, Inc.** has acquired **Guideline Research Corporation**. Terms of the deal, which included a combination of cash and stock, were not disclosed. Petra Mezzanine Fund, a private equity firm based in Nashville, Tenn., provided the financing for this transaction.

San Diego-based **Directions in Research** (DIR) has purchased the Grand Rapids, Mich., telephone interviewing center formerly operated by **Wirthlin Worldwide.** The 55-seat center will complement DIR's 100-seat center in San Diego. Led by Director of Field Operations Kevin Scheppman, Wirthlin Worldwide's operations team will join DIR as full-time staffers.

Alliances/strategic partnerships

Square One Research, Atlanta, and **Itracks**, a Saskatoon, Sask.-based online research firm, have announced a strategic partnership agreement under which Square One Research will use Itracks'

Research Calendar

The American Association for Public Opinion Research (AAPOR) will hold its annual conference on May 15-18 at the Sheraton Music City Hotel in Nashville, Tenn. For more information visit www.aapor.org.

The European Society for Opinion and Marketing Research (ESOMAR) will hold "Managing Research for Profit 2 - The Client's Perspective," a cross-industry forum, on May 18-20 in Brussels. For more information visit www.esomar.org.

The Marketing Research Association (MRA) will hold its annual conference in San Francisco on June 4-6 at the Hyatt Regency Embarcadero. For more information visit www.mra-net.org.

The European Society for Opinion and Marketing Research (ESOMAR) and the Advertising Research Foundation (ARF) are co-sponsoring the Worldwide Audience Measurement conference (radio, TV, media mix, print, online, out-of-home/ambient) on June 15-20 in Los Angeles. For more information visit www.esomar.org.

The Council of American Survey Research Organizations (CASRO) will hold its annual technology conference on June 19-20 at the Roosevelt Hotel in New York. For more information visit www.casro.org.

The Society of Insurance Research has announced its 2003 summer workshop series, which will be held on June 22-25 at the Embassy Suites Hotel (DFW South), Irving, Texas. The series will include workshops on market research, knowledge management and data mining. For more information visit www.sirnet.org or call 770-426-9270.

Target Marketing of Santa Barbara, Calif., will hold E-Metrics Summit 2003, an exploration of Web analytics, at the Four Seasons Biltmore Hotel in Santa Barbara on June 23-26. For more information visit www.emetrics.org.

The European Society for Opinion and Marketing Research (ESOMAR) will hold its annual congress, themed "Management, Accountability, and Research - the Quest for the Objective Truth," on September 14-17 in Prague. For more information visit www.esomar.org.

The American Marketing Association will hold its annual marketing research conference on September 14-17 at the Century Plaza Hotel in Los Angeles. For more information visit www.marketingpower.com.

The Association for Survey Computing (ASC) will hold a conference titled "Survey and Statistical Computing IV – The Impact of Technology on the Survey Process" on September 17-19 at Warwick University in England. For more information visit www.asc.org.uk.

Online Usability to provide online Web site usability testing for clients.

Chicago-based **Information Resources, Inc.** (IRI) has formed a new strategic agreement with **Management Ventures, Inc.** (MVI), a retail research organization. Under the agreement, IRI will become the exclusive supplier of syndicated retail tracking and consumer household panel-based information for MVI and its U.S. customers.

Greenfield Online, Inc., Wilton, Conn., has entered into a multi-year agreement with **Delta Marketing Dynamics, Inc.**, a Syracuse, N.Y., health care and pharmaceutical research firm. Under the agreement, Greenfield Online will provide Delta Marketing Dynamics' online research data collection needs.

U.K.-based research software firm **E-Tabs** has partnered with **Insight Marketing Systems,** Melbourne, Australia, to market and distribute Research Reporter market research management and library software to research buyers in the U.K. and Europe. Research Reporter is a Web-based system that integrates with a corporation's intranet to provide a central portal for research buyers to manage the disparate research conducted by their organization, and disseminate documents to internal clients and decision makers.

New York research firm **The Ziment Group** has joined forces with **WorldOne Research** to expand WebSurveyEurope, a physician Internet panel for marketing research in Europe. In the partnership, WebSurveyEurope will be responsible for client service, programming and panel/data management. WorldOne will be responsible for recruiting, translation and daily panel maintenance. WebSurveyEurope will focus in 2003 on building their reach in five European countries — the United Kingdom, France, Germany, Italy and Spain. In subsequent years, additional recruiting in other European countries will be initiated.

New York-based **NetRatings, Inc.** has reached an agreement with **Univision Online, Inc.**, the operator of www.univision.com, the most-visited Spanish-language Web site in the U.S., to build an Internet audience measurement panel to better understand Hispanic consumer behavior online. The agreement between NetRatings and Univision will span a five-year period. This agreement will result in a representative Hispanic Internet audience panel generated by industry accepted random-digit dial (RDD) methodology. NetRatings will deploy its Internet measurement technology to a representative panel of 3,600 Hispanic individuals. The Hispanic sample will be folded into the current Nielsen//NetRatings panel, reflecting a representation of the entire U.S. Internet universe.

Megatab, a Montreal research firm, has teamed up with Montreal, Quebec-based **Atredes Technologies**, a Web ergonomics, educational technology and Internet application development firm. By integrating Internet technologies, their objective is to control and measure the validity of the data collected through

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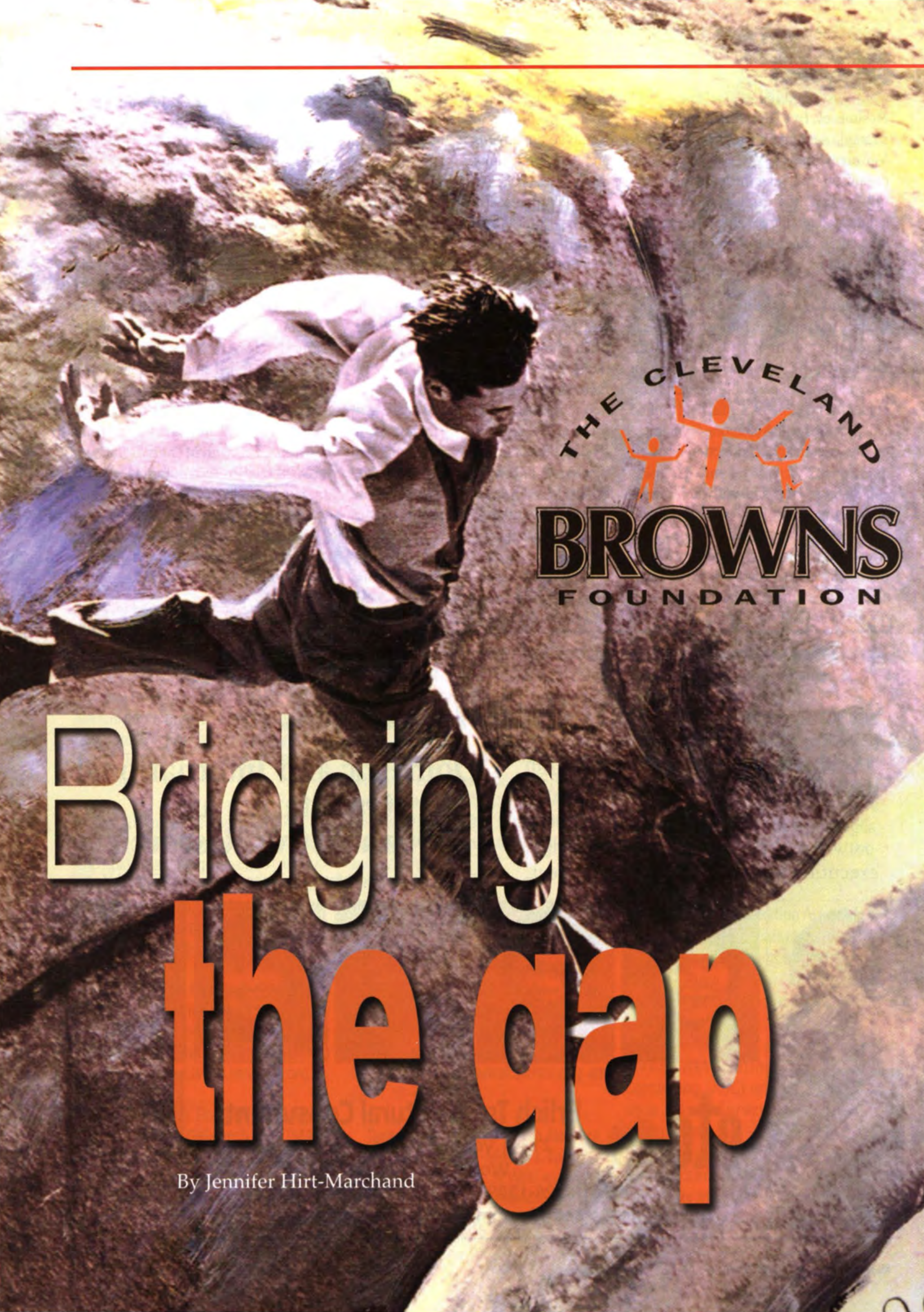

The Cleveland Browns Foundation

Bridging the gap

By Jennifer Hirt-Marchand

Agency uses qualitative and quantitative techniques to tackle an advertising campaign for the Cleveland Browns Foundation

Editor's note: Jennifer Hirt-Marchand is vice president and director of research for Marcus Thomas LLC, a Cleveland advertising and public relations agency. She can be reached at jhirt-marchand@marcusthomasllc.com.

The Cleveland Browns Foundation was founded in 1999 after the Cleveland Browns returned to Cleveland following a three-year hiatus from the NFL. The Foundation provides programs that benefit youths and funds nonprofit organizations that service underprivileged children in northeast Ohio.

In early 2002, after three years of existence, the Foundation felt it was time to elevate its philanthropic efforts in the area. It began developing a branding initiative with Cleveland-based Marcus Thomas LLC to differentiate its efforts from other local foundations and charity organizations. Research conducted with the Foundation's key stakeholders and current and prospective donors directly fed an advertising campaign created to support the branding efforts and increase awareness of the Foundation's commitment to youths in northeast Ohio.

Applying qualitative and quantitative research methodologies

Research findings from both qualitative and quantitative studies were used to develop a brand identity for the Foundation and a supporting advertising campaign. The first research phase involved in-depth, one-on-one, internal interviews conducted with key stakeholders of the Foundation, including management and board members. The research objective was to determine how the staff wanted the Foundation to be perceived and to identify obstacles to achieving that brand positioning.

Findings from that study fed directly into development of the second, quantitative phase. The quantitative phase queried members of the Foundation's target audience in an online survey, including current donors and prospects, about their perceptions of the Foundation. Information gathered from both research studies was compared to determine whether a perceptual gap existed between how stakeholders wanted to be perceived and how target audiences actually perceived the Foundation.

Qualitative phase

In the first phase, one-on-one in-depth interviews were conducted with multiple staff and board members to determine the desired brand positioning for the Foundation. The interviews were completed over a three-day period and lasted approximately 45 to 60 minutes each. Participants were asked to take part in two projective exercises designed to bypass defense mechanisms and delve further into the audience's thought processes.

First, internal audiences were shown a series of 18 pictures or illustrations that, at first glance, had little (if anything) to do with charitable organizations or athletics. Participants were asked whether each image was associated with their "ideal image" of the Foundation. Participants were asked to think of their ideal image of the Foundation along the same lines as answering the question, "Who do I want to be when I grow up?" After participants selected pictures that best characterized their ideal Cleveland Browns Foundation, they were asked to clarify why they chose each one and to explain how each image characterized their ideal representation of the Foundation.

Second, participants were asked to select words from a list of 24 that were most frequently associated with their ideal Foundation and explain each word's connection to their view. This task forced participants to reveal their beliefs and value sets that influence how they view the Foundation

.

Quantitative phase

In the second phase, Marcus Thomas conducted 213 online surveys with Cleveland Browns Foundation donors and prospects, who were revealed and defined during the in-depth interviews conduct-

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Innovate safely

Don't shoot your ideation session in the foot

By Gregg Fraley

Editor's note: Gregg Fraley is principal at D.S. Fraley Associates, a Chicago research company. He can be reached at 773-536-9630 or at gregg@dsfraley.com.

There is a growing need in the research industry for consultants who specialize in assisting corporations with new product development. Many qualitative research moderators are helping to fill this need. They facilitate a technique that has come to be called ideation. Ideation is essentially structured brainstorming. Traditional brainstorming — a technique that has been around for years — falls in and out of favor because results are too frequently hit-or-miss. Ideation, on the other hand, addresses most of the shortcomings of brainstorming by putting a structure around it. The structure includes techniques to generate not only more ideas, but more on-target ideas.

This added structure works — and more corporations are realizing the benefits and joining the trend. Managers are often pleased with results — but perhaps not pleased often enough. I suggest that managers sometimes end up disappointed because the sessions are being subtly compromised — sometimes by the participants, sometimes by the "system," sometimes by the planners themselves. In the latter case, it's unintended of course, but the effect is the same as if one deliberately loaded a pistol, took off his or her shoe and pulled the trigger.

Given the investment of time and money, it's disheartening how often these sessions fail to produce mar-

ketable concepts. It shouldn't be surprising. Ideation sessions are complex events — it's difficult to guide the collective imagination of a team. There are no guarantees of results even under perfect circumstances. But just like the duck hunter who is taught to keep the safety on while striding through the fields, there are ways to avoid disaster. Here are nine ways to avoid shooting yourself in the foot as you plan and execute your next ideation session.

Potential self-inflicted injury #1: not being there — no real commitment

It's Monday and an ideation session is called for Friday morning at 9 a.m. The goal is to develop some new product ideas for implementation next year. It's to occur in the conference room and a working lunch is planned. The memo says the meeting will be over by 2:00. Eight people, across corporate functions, are invited. A professional facilitator is brought in to help. The facilitator makes efforts to design a good session, but his corporate contact person avoids extensive discussion and he's had to make due with a few quick phone calls.

Friday arrives and the facilitator is alone in the room at 9:00. Six people have arrived by 9:15. One of the missing phones in — can't make it due to an emergency at the plant. Nobody knows about the other guy. At 9:40 the session gets off to a sluggish start. An hour goes by. Two participants begin slipping in and out of the room to take cell phone calls. Administrators occasionally duck in and whisper questions. An introvert makes notes on a piece of paper but doesn't participate in spoken-out-loud idea generation. The rest of the team seems somewhat constrained because a high-level manager in the group is editing the ideas as they're offered. The facilitator gently reminds the manager of the non-judgment rule, but this guidance is treated as a joke. The guy who was missing-in-action shows up at 10:30 and has no idea what's going on. The session ends with just four people present, and the results are nearly nonexistent.

Safety tip: This session was doomed from the start because there was no real commitment to the process. The evidence: facilitator blow-off, late arrivals, cell phones, invasive administrators, and ignoring the rule to suspend judgment. In this scenario, even the participants who showed were probably missing-in-action. Ideation synergy happens when everybody's head is in the room, and when everyone is truly "present" for the challenge at hand. Like most creative acts, ideation is most effective when people get totally involved in the content — it's a flow experience. Imaginative thinking doesn't happen with distractions, poor planning and low energy. And the best ideation sessions are conducted offsite in order to minimize the constant interruptions. And by all means, if there's low or no energy, forget the whole idea!

Potential self-inflicted injury #2: facilitate it yourself

A software company needs ideas for a new product introduction. The marketing group decides to hold an ideation session to come up with specific concepts for the launch. There is a sense of urgency — the CEO wants to review concepts immediately. Budgets are tight and so the group decides to facilitate the session themselves. One of the managers has some facilitation training, so he takes the pen and stands in the appropriate spot next to the flip chart. The session goes out of control almost immediately. Ideas are brought up and shot down in quick succession. Tempers flare and the team divides into several competing camps. The facilitator not-so-subtly sides with people on his immediate team. The session ends with three unexciting and watered down launch concepts that were the result of group compromise.

Safety tip: Don't facilitate your own sessions. Hire a qualified ideation facilitator. Spend the money, get someone experienced, and check references. A facilitator's first job is to be neutral and to focus on process, and it's amazingly hard for the already-involved to stay out of the way. The facilitator in the scenario above was neither neutral nor process-oriented — he allowed the dialog to disintegrate into the pattern of idea-critique. The ideal process for ideation is long stretches of idea generation, followed by constructive convergence — with no mixing of the two.

The manager of a group is also a risky choice. Team managers have a difficult time managing process and time, and can seldom resist the urge to contribute ideas. With the best intentions, they may subtly edit the ideas and thoughts of others. People notice, and the flow of ideas, particularly the wild out-of-the box ideas, shuts down.

Many corporate groups have trained facilitators on staff. If they are not on the project team, they can be ideal process facilitators for your session. Many organizations, however, don't have anyone qualified to lead an ideation session.

This is not to say there are no great leaders in these groups, but ideation facilitation is a niche skill. Even trained facilitators in strategic planning processes are not necessarily good choices. The reason: Ideation is fundamentally different. It's not a critical/analytical process. Some of the most powerful consulting groups in the world (and they will be nameless here!) are ill-prepared to assist with ideation because their skills are "rigorous analysis"-oriented. New ideas don't spring forth from analytical thought; they spring forth from a mindset of openness, curiosity, wonderment, novelty, fun and risk.

Potential self-inflicted injury #3: — no time for ideas to incubate

Ideation sessions are often the result of a corporate emergency. The competition comes up with an innovation that could put you out of business, and that ideation session you've been putting off for months suddenly becomes a top priority. Management sees the need — that's the good news. The trigger is immediately pulled — bam! — let's do the session! Now! People are flown in from the far corners of the globe and hustled into a hotel conference room. Someone presents a hastily done PowerPoint presentation — an analysis on the status of things — and that goes on for a couple of hours. Then the flip charts come out and the brainstorming begins. And it continues all day. You work through lunch, breaks are short, and the coffee is bad. Everybody is brain dead by 3 p.m. (or much earlier, more likely), but they battle gamely on.

Has this ever resulted in a wonderful new concept? I suppose brute force cybernetics has worked once or twice, but usually what emerges from these types of sessions is a rehash of all the old or obvious ideas.

In the haste to get a session together quickly, the leaders, consultants and participants have no opportunity to think about the challenge ahead of time. There's no time to conduct, review, or research data which might inform the ideation. There's no chance for an exploration that might reframe the challenge. Then the PowerPoint introduction sets an atmosphere of logical analysis — which is not where you want the "heads" to be during an ideation session. The brain does not turn on a dime from analytical thinking to imaginative thinking. Logical analysis is critical, but the time to do it is before, not during, the session.

Safety tip: Give participants notice of what's going to happen in advance and give them (fun and involving) tasks that will get them thinking, a lot, about the challenge. A homework assignment may include a shopping trip, observation of products in use, and/or Internet research. These activities will give the brain a chance to do what it does best — ruminate and come up with new combinations. When the session does start, you won't need the PowerPoint — you can spend the entire day in imaginative mode.

Potential self-inflicted injury #4: overly ambitious or poorly defined goals

"We want breakthrough innovation" says the CEO. "Organize an ideation session that really gets us out of the box." So you go about making it happen. You set a tone that allows for anything and everything; you even invite in some "trained brain" outsiders to get a fresh perspective. Except that when it happens you are not prepared for a wall of wacky, far-out, impractical, expensive and illegal solutions. Now, you chicken out and change your mind during the session because you fear you won't be able to deliver anything to the CEO. You redirect the group to more close-in, more practical ideas. And what do you end up with? Unpolished, untamed far-out concepts, and a few close-in ideas. A lot of valuable time is wasted, and you get about half of what you're looking for.

Safety tip: Know what you want. Clearly define your challenge and direct your ideation towards that specific need. Don't frame a session with an "anything goes" opening and then change horses midstream. When you want breakthrough thinking, brace yourself for the unexpected. Be prepared for ideas outside the current paradigm — ideas that could change the business drastically. Maybe it's a new distribution channel, maybe it's a spin-off company, or maybe a new factory to produce a radically different product. These things take time to implement.

What ever happened to good old-fashioned improvement? It's totally fine to devote an ideation session to practical ideas for improvement. In fact your odds for success are much higher than in a session dedicated to breakthrough innovation. Sometimes in-the-box thinking is exactly what you want. Many ideation sessions are planned, and "innovation" is the goal. A vague objective like this, however, often leads to two disappointing outcomes. First, the ideas generated (while usually worthwhile) may be too generic or ambitious to be realistically implemented — at least in a short timeframe. And second, a more specific outcome, which might be more appropriate, is not realized.

Potential self-inflicted injury #5: two days of ideation a year

You pull the whole team in once a year. It's difficult to get everyone together in a decentralized organization. These infrequent sessions are viewed as the time when the "magic bullet" will be identified. The ideation team is comprised of people who spend most of their working hours in demanding, complex management jobs…jobs that require constant critical analytical thinking. They fly in for the pow-wow and spend two solid days generating ideas. They are not used to this. They get off to a good start but mental fatigue soon takes over. Ideation, for these people, seems like an unnatural act.

Safety tip: Why wait to begin ideation until everybody is in one physical place? You should be generating ideas all the time. With e-mail, Web, and database technologies people can contribute ideas wherever they are, and whenever the spirit moves them. Virtual sessions can then be coordinated by a facilitator for highly focused efforts. Or, instead of flying everyone to a central site, organize in-person sessions at regional centers. Respond to these regional efforts by providing feedback on the ideas. Conduct regular reviews of ideas on an actively managed set of lists. If you want to have skilled idea generators on your team, they must practice the skill constantly. Practice in small teams, for short bursts of time, frequently! Train those brains! Then, when the marathon session happens, your team is conditioned to handle it.

Potential self-inflicted injury #6: not inviting the "troublemakers"

Developing the invitation list for

an ideation session is a real challenge. You choose your best people, your best thinkers. As you review the list of candidates you cross folks off the list who have a history of, well, being a pain. You have your session and it seems to go very well. You quickly identify the most promising ideas and everyone agrees on how to move forward. It shocks you to learn later that you have missed the mark completely. Management — or consumers — are unexcited with your ideas and you are back at square one.

Safety tip: Invite a diverse team that includes both innovative and adaptive thinkers. The cross-pollination of different thinking styles on an ideation team generates the most creative solutions. Depending on your own personal creative style, we tend to invite those who...well, who think a lot we do. Sessions with homogenous teams feel productive — there are few conflicts. But everyone tends to have similar ideas.

Creative style has been expertly defined by researcher Michael Kirton with his famous adaptor/innovator scale (see www.kaicentre.com). The idea is that everyone on the scale is creative, but in different ways. Kirton has learned that it's easiest to communicate with people of your own thinking style — it requires less negotiation. The farther apart on the scale people are, the more they are viewed as "difficult." On a diverse team, adaptors can help make the ideas of high innovators workable. The innovators can expand on small improvement ideas and add real value. Bottom line: invite the "troublemakers."

Potential self-inflicted injury #7: guessing or projecting the consumer

You organize a session with a deliberately generalized objective — you want a really wide range of ideas. It works. You get ideas for all areas of the business and some interesting ideas for new products. You test the product concepts with consumers in focus groups and they bomb! And the business and operations ideas are rejected by the leaders of those groups. The feedback is that "You don't understand the problem," or more tersely, "It's not your problem."

Safety tip: Sometimes you want a free-for-all kind of session to explore ideas about your business. When you are trying to reach a specific consumer market (or an internal customer) however, it makes a lot of sense to get into the consumer's head — intimately — in order to generate ideas that resolve specific problems. Exploratory consumer research is an ideal preparatory step for an ideation session. Taking into account the insights and expressed consumer needs you gleaned in exploratory focus groups, you can tailor the structure of your ideation session to respond directly. Consider different ways to include the consumers. Invite one or more "trained brain" consumers to the ideation session itself — hire their thinking. Consider having the ideation team conduct their own interviews of the target audience and/or implement or perform observational research. Then, explore the challenge in some artistic way, through music, dance or drawing. This begins the session with an experience that invokes the imagination, the emotion and the spirit of the consumer. No, this isn't just touchy-feely for the sake of touchy-feely — it's a time-tested exploration that has been proven to lead to actual breakthroughs. And, while we're on the subject of touchy-feely…

Potential self-inflicted injury #8: cutting short the use of goofy games, energizers and fun

It's 2:00 p.m. on the first day of a two-day session. The morning went okay, but you know you're not there yet. The ideas just aren't exciting, so you've had to make some adjustments to your objectives. Some people arrived late due to bad weather in Chicago and now you're behind schedule. The facilitator gets everybody in a circle and hands out "angel cards." You think it's absurd but you go along. Then she (or he) starts tossing about an imaginary ball. You pull her aside and tell her to get on with the show and to cut all the energizers for the rest of the day in order to get back on schedule. She agrees reluctantly. You feel better but an hour later everybody looks like a zombie and the idea flow has slowed to dribs and drabs. For the rest of the day people are walking out, taking their own breaks, getting a bit snarly, talking on cell phones, etc. They are emotionally uninvolved. By the time they leave the group looks something like the walking wounded. And when the session ends, the results reflect those attitudes.

Safety tip: Resist the urge to cut the touchy-feely and energy-enhancing activities. In fact, add more. These games and energizers are exactly what the brain needs to get into, and stay in, an imaginative mode. The value of games and energizers is seriously undervalued in ideation sessions. Most facilitators are sensitive to time requirements and sensitive to touchy-feely resistance, and will usually only put in just enough games and fun stuff. They are well aware that these games can be viewed as a waste of time by the less experienced skeptics — the same skeptics who are often the folks paying the bill. When cuts are made to the agenda, such activities are unfortunately often the first things to go.

According to Pierce J. Howard, author of *The Owner's Manual For The Brain*, physical exercise is highly effective in improving the speed of recall, and much research points to an effect on the quality of mental function and the amount of recall. It releases endorphins, the neurotransmitters that relax us into a state of cortical alertness.

Humor also works. Tests of problem-solving ability yield better results when they are preceded by laughter. Many of the games/exercises used for energizing were originally designed for the theater. The intent is to bring the actor into the present moment, enabling him or her to respond to stimulus authentically. These exercises are time-tested — they bring people's minds into the room — instead of cranking away on other problems and challenges in their lives. Once a state of "being present" is achieved you will have more effective ideation results. This state is hard to maintain, however, and that's why about once an hour you need to refresh. You want people to play with ideas, and these games help establish the environment of playfulness that allows those magic ideas to pop up and be heard by the conscious mind. If you want the magic bullet, play with the magic ball.

And the good news? Even the skeptics usually end up being won over once they've participated.

Potential self-inflicted injury #9: not getting into action

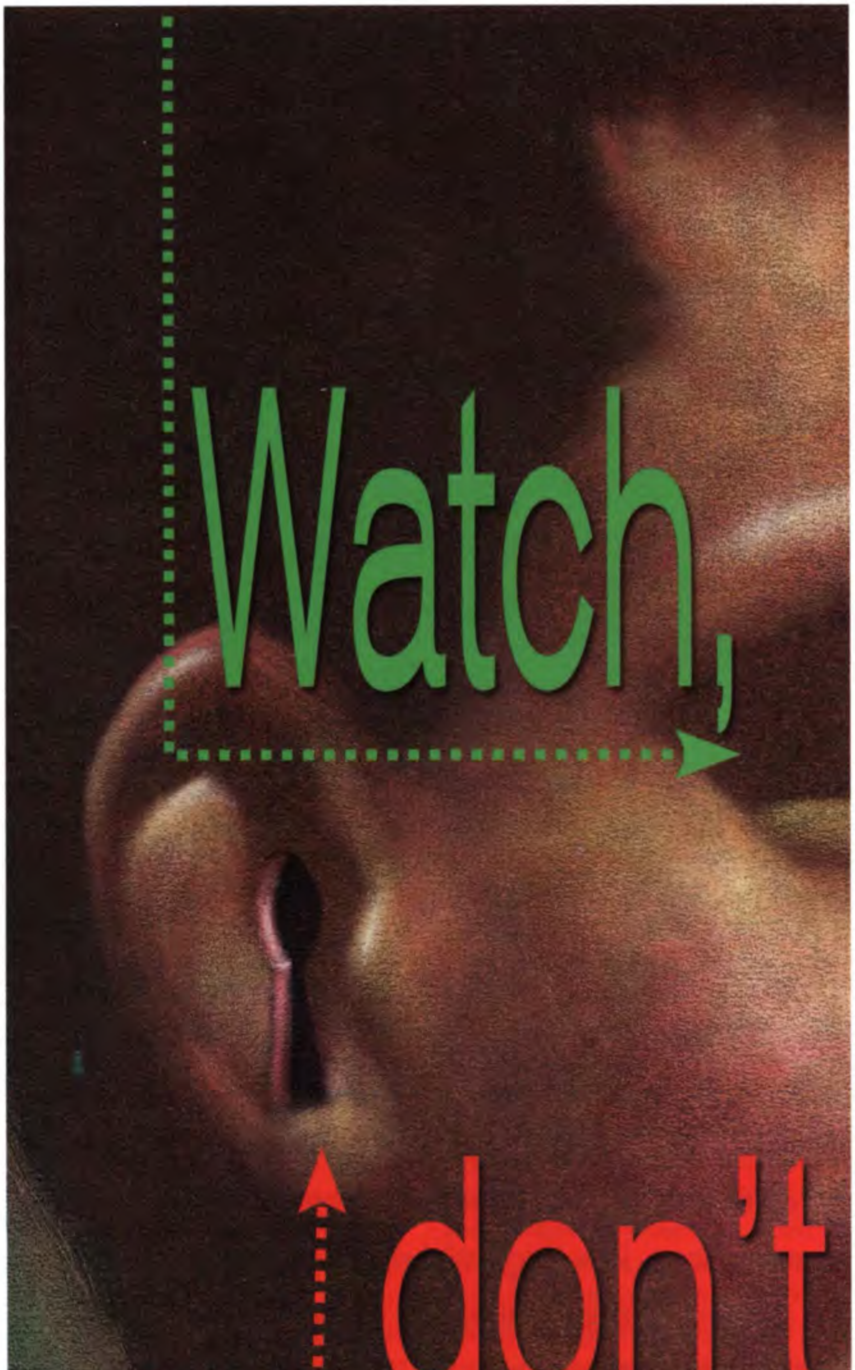
A month after the session, the business crisis that triggered it has passed. You were able to use a few of the ideas, and they are testing well in focus groups. That's been "good enough" — maybe even quite successful. It's easy to rationalize: "Well, we got what we wanted from the session. We don't need to explore/expand upon the other ideas we generated." You "mean to" get to that list — but you never do.

Safety tip: Somebody needs to take ownership of all the ideas generated, and put a process in place to continually work them and put them into action. Have them reported and distributed as soon as possible. That data is a strategic asset and should be treated as such. The data should be easily accessible. Leverage that corporate intranet — with proper security of course. The longer the data gathers dust, the less likely it will ever be used.

Why this recommendation? Buried in that data could be the next idea that fuels the growth of your company. Ideas that seemed silly or impractical at first are often the best ideas, even if your brain and/or the corporate culture weren't ready to accept them initially. Out-of-the-box ideas are sometimes so jarring that the immediate reaction is, "No way." On further reflection you might see a way. Put a process in place to continue the work and put into action as many ideas as possible. You've invested the time and resources to conduct the session — by all means preserve the product!

Spur innovation

Idea generating sessions require commitment, focus and a considerable investment of time and money. Don't plan and conduct an ideation marathon session unless you are committed to the technique. Structured ideation can be the most important tool your organization has to really spur innovation. But like a duck hunter's rifle it must be used carefully. Don't shoot yourself in the foot. Keep the "safety" on and you'll enjoy better and more consistent results.



Why companies should ignore the voice of the customer

Editor's note: Douglas Ryan is president of Ryan Consulting, a Chicago research firm. He can be reached at 847-682-7332 or at dsryan@earthlink.net.

"Listen to your customer" is an adage invoked to both explain successful companies and to chide poor market performers. Many industry analysts point to customer-based innovation as the one true differentiator for companies in a world where technology and competition have reduced the time and returns from any particular product or service enhancement. That is because successful new features in almost any industry, whether it is in automobile design, online shopping or insurance products, are quickly assimilated, imitated or leapfrogged by competition. Thus, companies wishing to generate continued growth cannot rely on the advantage of any particular feature, but on a process by which a product or service is continually improved more quickly and more in line with evolving market needs than the competition. This recognition drives a rush to include words like "market-driven" and "customer-centered" in

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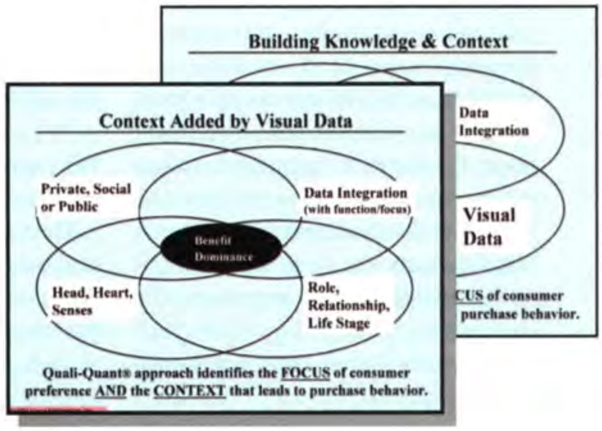

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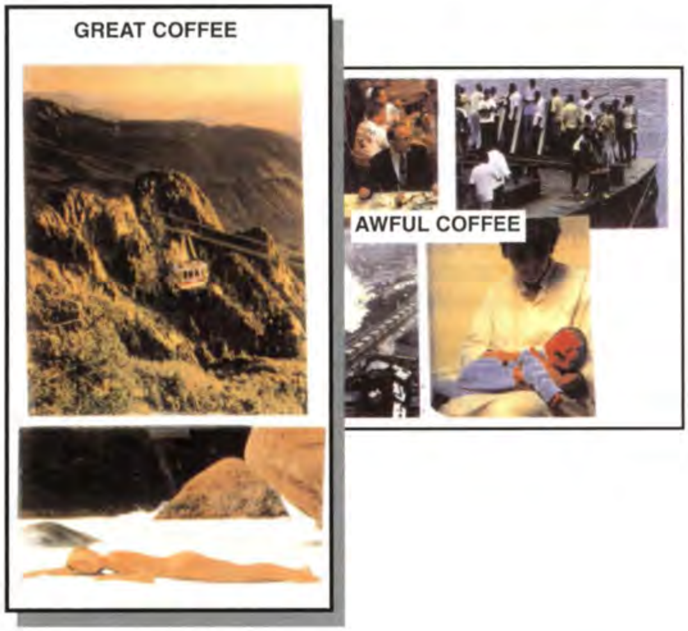

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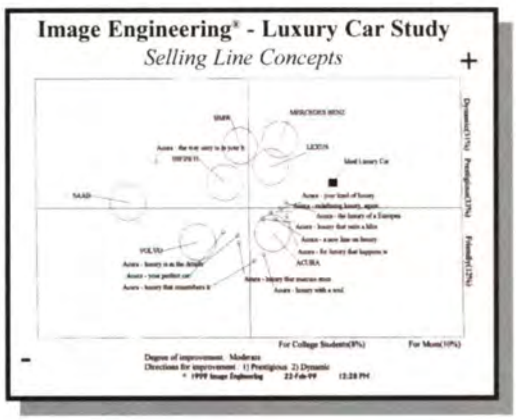

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their mission statements, along with a stepped up effort to gather increasing amounts of market feedback in the forms of surveys, focus groups, telephone interviews and other traditional research mechanisms.

In many companies, this enthusiasm for market feedback turns into cynicism as the various research studies pile up without any significant improvement in the product development process. In some cases, the increased depth of data fails to translate into deeper or more accurate consumer insights. In other cases, the data becomes a tool for no-fault decision making rather than a platform for better decisions (e.g., "We didn't include that feature because it didn't score well with our customer panel."). In still other cases, the new emphasis turns the company into the trappings of a bad political candidate, shifting from one approach to another in order to conform to the latest poll results.

The problem is that listening to your customers can often be a bad idea. This is because what customers say is not always a good indication of what they do. This is a well-established though well-ignored fact human behavior. A study in 1950[1] of telephone users asked whether they would prefer lighter headsets. The general answer was no. Yet, when the same subjects were presented with identical looking headsets that were of different weights, the lighter weights were widely preferred. An international study of international retail brands by McKinsey provides a more recent example of this same dissonance:

By comparing 1,500 consumers' ratings of how well the stores performed with the store choices these consumers actually made, we found that what they say and what they do are not always identical. Customers tend, for example, to say that they don't shop in particular stores because their friends do, but their friends' shopping choices turn out to be powerful motivators. Customers also overstate the importance of certain issues. In choosing grocery stores, for example, German shoppers are less influenced by the range of products stocked than they claim to be, so retailers that spend heavily to offer a wide product range might achieve better results by investing, for example, in more targeted marketing to boost a store's attractions for affinity customers.[2]

Why traditional listening tools may not work

There are numerous reasons why traditional marketing research techniques may not work. Some of them have to do with poor technique, such as using poorly structured or leading questions, or drawing quantitative projections from qualitative tools. But even if the techniques are properly used and executed, there are some inescapable pitfalls in the most common tools used for customer feedback. Among these are the following:

Self-selection bias

The very nature of responding to a survey or an invitation to a focus group reflects some ingoing degree of bias. The bias can be large or small depending on the circumstances. As an extreme example, a survey on marital sexual practices is likely to have a significant self-selection bias. Most people are hesitant to talk openly about intimate details of their lives with strangers, so those willing to respond are likely to have a particularly untypical mindset on the subject. Less dramatically, a company trying to market a service to busy C-level executives should be aware that anyone willing to take the time to show up to a focus group may not represent their core target. Self-selection biases show up in every circumstance when you require someone to raise their hand to participate. These biases will make the results of the research less reliable.

Social codes

People tend to observe the standard social codes even in commercial transactions. It is typical practice for a survey to begin by asking for the respondents to give their honest responses, but it is hard to put aside established behaviors that may dilute that honesty. In social situations, we learn to employ a range of behaviors to avoid conflict or to avoid offending someone. It is hard for people to suddenly put aside those ingrained behaviors. That difficulty is multiplied in group situations where people are not only interacting with a moderator or questionnaire but with other respondents. These behaviors tend to gloss over differences in opinion, both negative and positive, and make it harder to identify the most significant issues in an interview subject's response.

Avoidance of negative judgments

None of us likes to admit our failings, or to admit to traits that what we know others perceive to be failings. People tend to underreport the things that they are not supposed to do (e.g., the amount of television they watch) and overreport the things that they know they are supposed to do (e.g., how much of exercise they get). One of my nieces works as a babysitter, and estimates that the bedtimes parents tell her are "typical" for their children are usually between one-half hour and one hour before their actual bedtimes. Because most parents believe earlier bedtimes are better for children, they are prone to give the babysitter a more idealized version of their parenting discipline. This is a common problem for doctors, who often get misleading information from patients who don't want to reveal unhealthy parts of their lifestyle. So research based on self-reported data is skewed by people's desire to appear either more intelligent, organized, healthy, hip or generally better than they actually are.

Rational projection

People like to think that they make sensible choices. In truth, we make so many decisions each day about so many different things that most of us don't do a rational analysis for each choice. Nonetheless, in our desire to appear sensible to either ourselves or others, we often come up with reasoned explanations for our behavior, if pressed. In truth, we are rarely the logical creatures we pretend to be and emotions play a significant role in our decisions. Behavioral economists cite numerous instances when people systematically and consistently act irrationally. One common irrational behavior is referred to as the "framing effect," in which the same person will make a different decision based on how a choice is framed. For example, a problem about whether to administer a new drug to a group of 1,000 sick people can be presented as a gain (200 of 600 threatened people will be saved) or as a loss (400 of 600 threatened people will die). Although the outcomes are the exact same in each case, people tend to decide for the vaccine when presented as a gain and against it when it is presented as a loss.[3]

Consumer studies[4] in the beer industry provide an equally common if less academic less example of irrationality. Casual beer drinkers who drink mostly national brands are hard-pressed to identify their brands in a blind taste test. Yet when these same consumers are asked why they select a certain brand, they usually will refer to the taste, or ingredients related to taste, as their primary criterion. Rarely will drinkers refer to more emotional factors such as the brand image or the influence of their friends. That same scenario is played out over many categories because people look to provide a rational explanation for their choices when challenged to explain their behavior. This is problematic for researchers trying to determine the most relevant purchase criteria, as it often leads to either a mischaracterization of the main influences or a misprioritization of those influences.

Artificial environments

Some of the inherent difficulties of market research have an analogy in aspects of the Heisenberg Uncertainty Principle in physics. The Uncertainty Principle concludes that it is impossible to determine both the precise position and the momentum of a particle. In unscientific terms, the reason for this results from the fact that you can't measure something without bumping it a little, so the very act of measurement affects the results. The famous Western Electric time and motion studies in 1939 bore this out. In those studies, researchers were trying to determine the optimal environment for enhancing worker productivity. The experiments were confounded, however, by the workers' efforts to make a positive impression. Knowing they were being observed, the workers upped their output independently of the variables being controlled.

Whenever you put people into an artificial environment, be it physically or mentally, you affect the way they behave and think. The more artificial the environment, the more likely you are to get artificial responses.

Evaluation vs. projection

A good portion of market research

is flawed from the beginning because it asks its subjects for expertise that they don't have. It asks them to act as product designers, or worse yet, to predict the future. Some of the most profound thinkers of the business world, armed with a trove of data and years of training, try to do this with limited success, yet there is an almost mystical belief that a person off the street can perform that function. It is unrealistic to expect consumers to be futurists or new product designers. Humans tend to think linearly, and to project from what they already know. So if you ask a typical consumer to describe the ideal features of a new car, for example, you are likely to get a description of a car with more of one thing or less of another. In a story that typifies many product successes, Sony developed the Walkman in 1979 based on its own observation of consumer trends. Users of transistor radios, tape recorders, and boom boxes were telegraphing the desire for a more personal transportable sound system. Even the warning signs on buses and subway trains banning the playing of radios were a signal of the strong desire for people to listen to do just that as they commuted.[5] Yet no survey, phone interview or focus group ever resulted in the suggestion for the Walkman.

In his neo-classic book *Innovator's Dilemma,*[6] Clayton Christensen describes the futility of expecting consumers to provide new product direction in the case of disruptive technologies. Christensen describes disruptive technologies as those that change the accepted value proposition of a product category, as opposed to sustaining technologies that provide an improvement on current performance attributes. He cites examples across numerous industries of customers explicitly rejecting products that were to become the future mainstream leaders.

Consumers are excellent at evaluating how well something does or does not meet their needs. They are not proficient at designing better ways to meet those needs. In the words of the Web usability maven Jakob Nielsen,[7] "users are not designers, and designers are not users." Just as the skills required to be a first-rate film critic are different from the skills necessary to be a first-rate film director, so are the abilities of a consumer to evaluate a product different than the ability to create a product.

Watching instead of listening

Both figuratively and literally, watching is superior to listening. Watching implies observing choices that consumers make with a minimum of interference. In most every circumstance, observing how consumers actually behave provides more useful feedback than having them talk about how they behave. Having a record of how many times a consumer purchased your product is worth more than having that same consumer describe herself as a heavy or loyal user. In Aristotelian fashion, behavior reveals character in a way that speech does not. As observed in the examples in the introduction, what people say is often at odds with what they do.

To ensure the most actionable information, the careful marketer should observe these guidelines:

<u>Watch the right people</u>

Avoid the self-selection bias by focusing on the people who are in the best position to give you the information you need rather than the people who are easiest to access. Technical product or service companies often make the mistake of enlisting consumers eager to talk about new gadgets. As a result, their interactions are dominated by early adopters who may or may not represent the true target group. Savvy researchers should avoid marketing research lists, which can be dominated by "professional" responders. Instead look to organizations or situations where your target is likely to be. For example, a company wishing to observe working moms might approach a local day care center for subjects.

Part of making sure you're getting both the right people and the right information is to use a control group. If you want to learn more about a group, study their contrasting counterparts as well. You'll learn more about heavy users by including light users, more about loyal customers by including non-loyal, etc. Because existing users have already demonstrated some affinity for a product's value proposition, it is non-users who are more likely to offer overlooked perspectives. The importance of control groups was brought to light by recent developments in medical treatments for people with back problems[8]. Doctors had been routinely recommending back surgery for years to treat patients complaining of back pain and whose CT or MRI scans revealed damaged disks. But then a recent study of otherwise healthy people found it was not unusual to find degenerated disks in people who are fully functioning. As a result, the benefit of these frequent surgeries is now being called into question. The lesson is to make sure a control group is present to guide your insights and conclusions.

<u>Observe choices instead of eliciting judgments</u>

Actions speak louder than words. Observing or recording the choices consumers make provides more reliable and objective data than asking them for their judgments and opinions. This fact was a key force behind television rating service AC Nielsen's accelerated move to automated people meters. Early trials with the meters had the unintended effect of highlighting the flaws in the household diary process that the company had been relying on families to fill out for years. Memory, habit, and other human traits created a gap between what "Nielsen" families filled out in their diaries and what it turned out they actually were doing.

In this vein, watching consumers shopping or asking them to bring in store receipts is far more effective than asking them what they have purchased in the last week. Watching or measuring respondents' choices in a natural environment without overt interference is more effective than asking them to list their preferences. A clever local travel agency ran a promotion last year that asked contest entrants to select from five equally priced U.S. travel destinations for their grand prize. That promotion provided better data about the respondents' vacation preferences than a general survey because entrants had to consider their destination choice in the context of actually being sent there. Research that is built around real choices generates more meaningful consumer feedback.

Strive for invisibility

The ideal situation is to collect information with a minimum of intrusion. The more that people are aware of being monitored, the more likely they are to alter their patterns of behavior. Web sites provide a close to ideal model of being able to unobtrusively measure where people visit and how long they stay. Total invisibility is difficult to achieve, but anything that reduces the effect of the measurement increases the validity of the measure.

The invisibility goes both ways. If the users can respond anonymously, their choices are likely to be less self-censored. True anonymity is hard to construct if you have to track the results over time, or want to go back to the same source for follow-up research. In this case, allowing subjects to use pseudonyms or impersonal usernames can provide them with more comfort in expressing strong or critical opinions.

Meet them in their environment

This goes hand-in-hand with the goal of invisibility. In the spirit of anthropological field studies, whenever possible, the research should go to the subject and not the other way around. Consumers should be allowed to sample new products in the place and situations where they would be expected to use them. New features for a PDA would be better examined by giving them to an executive heading off on a business trip rather than sitting in a contrived usability lab. Similarly, TV ads are more effectively evaluated if inserted among the clutter of programs and other ads of an evening at home, than if reviewed by themselves in a research lab with a moderator. A more realistic context leads to more reliable responses.

Avoid abstraction

The more abstract and conceptual you ask consumers to be, the more you move away from their expertise as research subjects. To avoid this, marketers should strive to provide concrete stimuli rather than conceptual stimuli. When dealing with new products, it may not be possible to have existing products for consumers to experience. In this case, even rough prototypes are far more valuable than positioning statements or product descriptions. Web sites should appear on a computer screen (even if no links actually work), print ads should appear in a magazine, and products should appear in as close to a form as people would find them on the store shelf. In early development stages, these prototypes will often be rudimentary. That is perfectly fine as part of an iterative process that leads to more robust prototypes. The goal should be to make something as real as possible for the consumer in order to ensure the most useful feedback.

Researchers also have to be careful to avoid eliciting predictive leaps from consumers. Watching instead of listening helps keep the learning focused in the present and not wandering into the future tense. Referring to the Walkman example from above, questions such as "What new features would you like?" or "How could this be improved?" ask the consumer to go beyond their interest and expertise. That is akin to a doctor asking a patient what medication to prescribe. The focus should be on understanding how an existing product or prototype meets or fails what the consumer is using it for.

Connecting the dots

There are issues of cost involved with these recommendations. In fact, many of the reasons the traditional tools are constantly (mis)used is that they are relatively easy and cheap to implement. While it does take more effort to observe people in their everyday lives than to mail out surveys or gather around a focus group table, watching does not have to be more expensive than listening. The improved richness and accuracy of the watching can justify a smaller pool of subjects, and thereby cost no more than traditional tools.

The larger issue around these recommendations may be around existing mindsets. This approach refutes the notion that the secret to market success lies in the mouths of every consumer, and the resulting belief that if you just talk to them, those secrets will be revealed. If this were true, the most valuable marketing tool would be a camcorder. The more accurate model is to think of market research as a game of connect-the-dots. Each consumer only has enough information to provide you with one dot. The first burden of marketing research is to ensure that each dot is mapped as accurately as possible. All the points above make the case that watching customers provides a more accurate map than just listening to them. When enough dots are in place, the second challenge is to then connect the dots. That is dependent on the insight and attentiveness of the marketer, not of the consumer. It is the failure to understand these responsibilities that leads to the common frustrations expressed in the introduction. A truly market-driven company not only understands how to get better market feedback, but also understands the important interpretive role they must play to transform that feedback into meaningful improvement.

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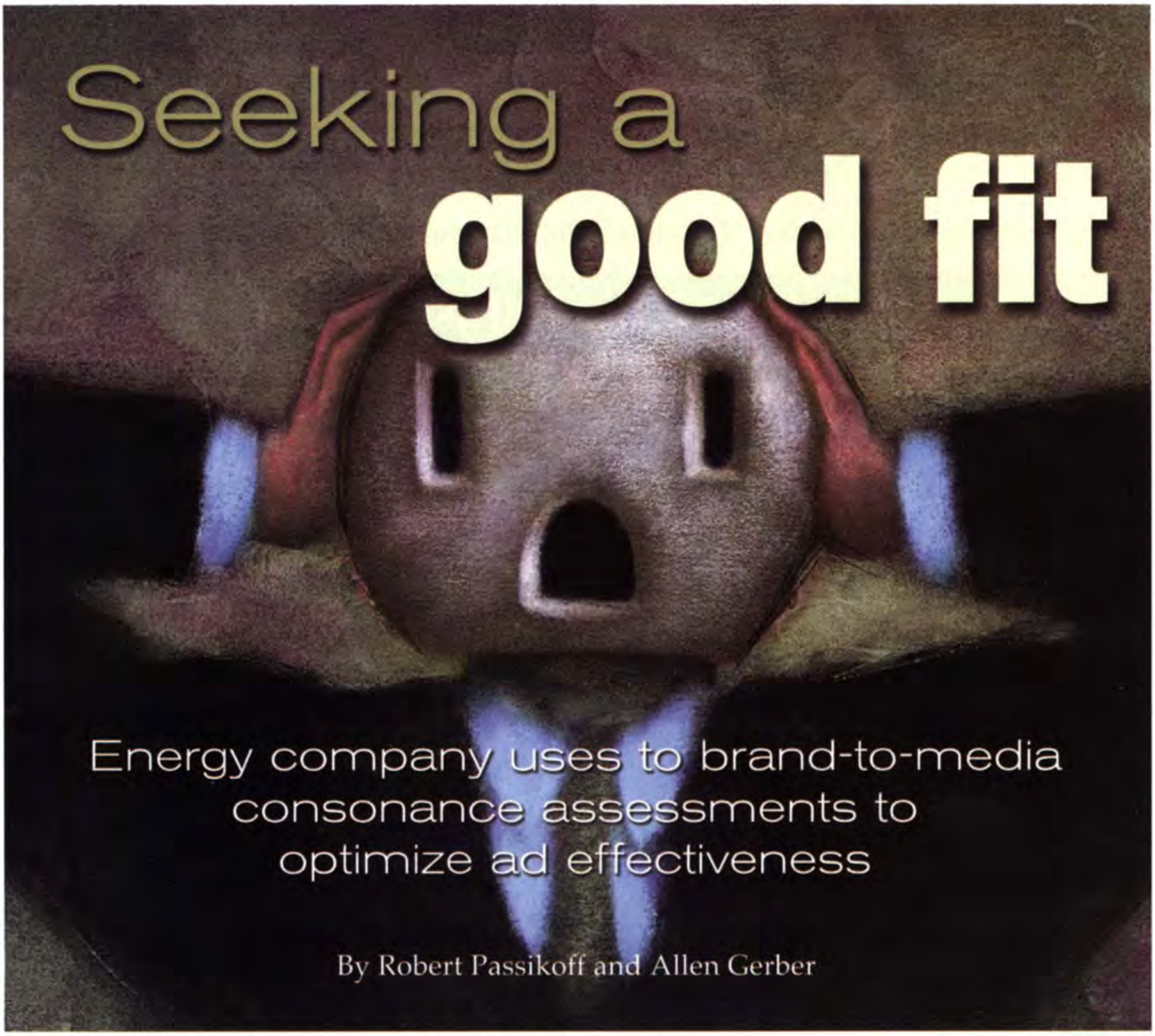


Seeking a good fit

Energy company uses to brand-to-media consonance assessments to optimize ad effectiveness

By Robert Passikoff and Allen Gerber

Editor's note: Robert Passikoff is president of Brand Keys, Inc., a New York research firm. He can be reached at robertp@brandkeys.com. Allen Gerber is general manager of corporate advertising and brand at KeySpan Energy, a Brooklyn, N.Y.-based energy services firm. He can be reached at agerber@keyspanenergy.com.

Nearly a century ago department store magnate John Wanamaker said "I know half my advertising budget is wasted — I just don't know which half." The way ad dollars are invested today it's still true: half our ad dollars (maybe more in the 24/7, Internet-driven, 21st century) are wasted. But why?

Marketers still buy media based on what a gigantic media services company has identified as providing as much reach and frequency as they can afford, in a media vehicle that's pretty much ideal for "their" demographic. They pay for it, run the ad, and that's pretty much it.

But what do marketers really get? Sure, they get the time or space paid for — which presumably delivered some audience determined by the reach and frequency. But they get no proof — not even a certifiable likelihood — that anyone actually saw or heard or read their message. No guarantee the televiewer didn't zap the commercial. No promise that readers didn't skip over their ad page. No warranty that the audience that did see it will remember it. Or think well of the advertised brand — let alone buy it! Nothing to let marketers know that they connected with their consumer or that their advertising had any real market effect. You'd think that 100 years after Wanamaker's lament there must be more to it...some way to assure marketers that they aren't wasting their money.

Why are connecting with consumers, optimizing media selection and delivering advertising effective-

ness more complex and prone to error than ever before? Inarguably,

• Media habits are changing. Where and how to find target audiences has gotten extraordinarily complex. Consumers are no longer glued to three television networks (although some marketers buy media as if they still are). Fewer than half of Americans subscribe to newspapers. And where once there was a dominant sports magazine, there are well over 100 — subdivided by special interests. People now spend 10 percent of their time online. You get the idea.

• The lines are increasingly blurred between consumer demographic and lifestyle profiles. The list of "acceptable" media options gets longer and longer every day, making it increasingly less clear where the highest quality target audiences for the brand are lurking.

• More TV and cable network options means that more and more, the consumer has the power to self-select the ad message he or she will be exposed to. Or zap! Or just plain ignore.

• Further, shrinking ad budgets mean companies don't have as many media dollars to allocate as they had in years gone by. Mistakes are more costly than they used to be.

• To a media vehicle, an ad is an ad is an ad. They make no special provisions for how your brand is perceived. Yet media choices can have enormous impact on brand attributes.

Your company has invested countless dollars in developing and supporting your "brand." Wouldn't you feel better about how you were spending your money if there were some way to insert your brand's values into the media planning process? To take you beyond standard "reach and frequency" thinking?

It's not that the concept of inserting the brand into the media plan hasn't been talked about before. It's been examined on a qualitative basis, but until recently has not been validated on a quantitative, statistically generalizable basis. Media planners haven't had the ability to meaningfully introduce real brand values into the planning process, so they do what they know best. But planning by reach and frequency alone is flawed, because the brand's values and the media vehicle's values may not be consonant — even when the editorial environment and reach and frequency numbers look right.

It is obvious that your brands will perform better in media environments that are clearly in sync with your products and/or services. For example, OTC drugs are often placed on TV news since news consumers tend to be older. But how can media planners find the fine line between, say, *NBC Nightly News*, *60 Minutes*, and CNN? On one side of the line your key brand attributes are being well received, on the other side they may not be. As we said before, mistakes can be costly.

By inserting brand values into the media planning process, marketers can better assure they connect with — and communicate core brand values to — consumers. Aligning brand values with the values of the individual media vehicle or cable network on which you plan to advertise lets planners predict increased levels of brand awareness and positive brand imagery, before you spend your money. You connect better with your target audience and maximize your brand's ad effectiveness. You get more cost-effective and strategic media planning — before you spend your money!

The theoretical framework

At the 7th annual ARF Copy Research Workshop in 1990, the Advertising Research Foundation published the results of its seminal Copy Validity Project. This research indicated that the methodological framework of "brand liking" or "brand bonding" was the metric most highly correlated to sales. This is the same framework used by our firms to determine brand-to-media consonance (B2MC). It is successful at predicting higher levels of attention to advertising and predicting increased levels of positive imagery for the brand.

Recent research affirms that this methodology can be profitably extended to the complex process of media selection. It proves that brand-to-media consonance can be measured to identify the degree to which your brand's values are enhanced by the very act of its appearance in a particular media vehicle. It proves that viewers think better of your brand in a "high" consonance vehicle than in just another "acceptable-by-traditional-standards" option.

It is axiomatic that by selecting media where consumers pay more attention to your advertising, you connect better with them. And nobody can deny that selecting media so that your target audience thinks better of your brand, is, at the very least, related to increased advertising effectiveness.

Calculating brand-to-media consonance

In partnership with KeySpan Energy, a research program was implemented to determine:

• The degree to which a cable channel on which a commercial for KeySpan might appear would either enhance or hurt KeySpan's overall brand equity score, i.e., how it measures up to the consumers' expectations; and

• The commercial's subsequent performance via a traditional advertising test on measures of both category-aided advertising awareness as well as direct image ratings of KeySpan on eight product imagery statements.

KeySpan had previously conducted a B2MC validity test having to do with specific TV shows and now wanted to extend the assessments to include cable networks. This research was conducted to determine the effects each of 11 cable networks had on KeySpan's ad awareness scores and on target audience ratings of the brand.

Telephone interviews were conducted with 500 members of KeySpan's primary target audience (residential and commercial decision-makers) within KeySpan's New York service area. Each respondent was asked to rate:

• KeySpan on eight image statements;

• the KeySpan brand as a stand-alone entity (i.e., not in the context of any particular media vehicle);

• the Ideal energy provider; and

• the KeySpan brand within the context of each of 11 cable networks: BET; News TV 12 (Cablevision); CNN; The Discovery Channel; ESPN; FX Network; The History Channel; Lifetime; The Sci Fi Channel; TNT; WLNY TV 55.

Based upon the Brand Keys algorithm and the top four drivers of brand loyalty for the energy provider category, these assessments indicated:

• KeySpan's overall brand equity index independent of any specific TV media context was 116.

• KeySpan's overall brand equity score (an average of the eight image statements and independent of any specific TV show or cable network) was calculated to be 4.88.

• KeySpan's brand equity scores — if advertised on each of the 11 cable networks. Positive enhancement of the KeySpan brand values would be indicated by a score of 121 or more. Detraction from those brand values would be indicated by an equity score of 111 or less. In this case, the B2MC scores were found to be:

BET[1]	106
News TV 12	114
CNN	129
The Discovery Channel	109
ESPN	124
FX Network	118
The History Channel	126
Lifetime	111
Sci Fi Channel	116
TNT	122
WLNY TV 55	108

As the general industry practice views cable networks as "electronic magazines," initial B2MC assessments were gathered solely on the basis of the name of the cable network, e.g., TNT or Sci Fi or ESPN.

However, in order to determine precise brand-to-media effects, in a second phase of the research, a current 30-second TV commercial for KeySpan was inserted into two programs appearing on each cable network. To maintain a truly "competitive" frame, shows were selected on the basis of a single day of the week (Thursday) and two time-slots (10:00 a.m. and 8:00 p.m.)[2]. The shows included:

BET: *BET Start, Open Mike*
News 12: *Daytime Edition, Evening Edition*
CNN: *CNN Live, Connie Chung*
Discovery: *Home Matters, Critical Rescue*
ESPN: *SportsCenter,* NHL Hockey
FX: *M*A*S*H, Sleepers*
History: *Fire on the Mountain, Mysteries of the Bible*
Lifetime: *Golden Girls, Unsolved*

Mysteries
Sci Fi: *The Sentinel, Soulkeeper*
TNT: *ER*, NBA Basketball
WLNY: *Oprah, Dr. Phil*

A standard captive audience, clutter-exposure test was conducted to measure ad awareness and KeySpan brand perceptions after exposure to the program in which the KeySpan ad appeared. The same KeySpan TV commercial, "Fireplace," was inserted into all 22 programs, 14-16 minutes into each show. For analysis purposes cable network awareness and brand imagery evaluations were obtained by averaging the two shows' effects together.

Cable network brand-to-media consonance effects

Table 1 shows the brand-to-media consonance scores for each of the cable networks collected in Phase 1 telephone interviews and the KeySpan ad awareness and attribute rating scores produced by advertising on that particular cable program in Phase 2.

FIGURE 1

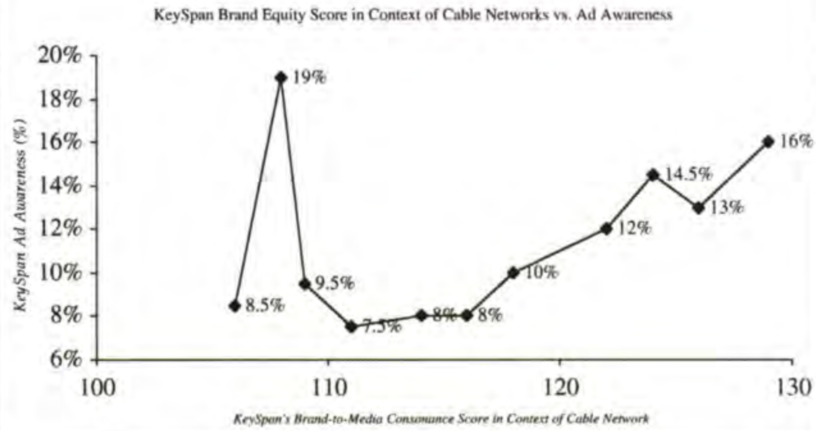


TABLE 1

CABLE NETWORKS	Brand Keys Brand-to-Media Consonance Score	Mean Category-Aided Advertising Awareness	Mean Overall Average Attribute Rating
BET	106	8.5%	4.95
News TV 12 (Cablevision)	114	8%	5.15
CNN	129	16%	5.78
The Discovery Channel	109	9.5%	4.90
ESPN	124	14.5%	5.49
FX Network	118	10%	5.01
The History Channel	126	13%	5.38
Lifetime Television	111	7.5%	4.95
Sci Fi Channel	116	8%	5.00
TNT	122	12%	5.25
WLNY TV 55	108	19%	5.79

n.b., KeySpan — not in the context of any media — was assessed an overall 116 and an overall imagery rating of 4.88.

As shown in Figure 1, there is a remarkable correlation between the brand-to-media consonance scores and the category-aided advertising awareness it received in the test.

There was also a notable correlation between the brand equity scores that KeySpan received and the mean brand attribute ratings it received in response to the cable shows.

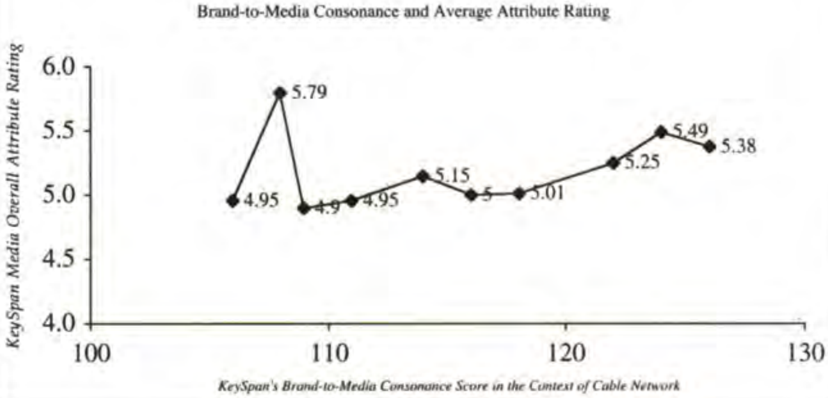
Implications of the brand-to-media consonance model

It is universally acknowledged that more is riding on every media decision than at any time in memory. It seems as though the industry has been talking about the importance of brand forever. Given the immense investments made "in the brand," isn't it about time that marketers insist that the brand — and its very own values — be made a significant part of the media planning process? Beyond demographics, reach and frequency? The time has come to be proactive.

And the industry knows we need something better. How much longer can we rely upon "sliced and diced" reader/viewer/listener profiles? More recent tools based upon the category and brand-purchase behavior of individuals exposed to specific media options have been investigated, but, unhappily, they look suspiciously like a re-shuffling of data-mined, previously-identified segments. These newer systems are an improvement over the approaches of decades past. But they do not actually insert the brand — and the values that define the brand — into the media selection process.

They do not address the important issue of to what degree, and in what specific ways, the very act of being exposed to a commercial within a particular media vehicle enhances or

FIGURE 2



detracts from brand values. Or the degree to which the target audience will actually pay attention to the advertisement. Or what the target audience will believe or feel about the brand in question. In short, they neither improve an advertiser's opportunity to connect with their consumers, nor do they increase the effectiveness of their efforts.

Current research reveals that appropriately configured, brand-to-media consonance metrics can be a valuable complement to the more traditional media planning tools. Optimized results can be accomplished without sacrificing traditional skill sets that leverage reach and frequency, or demographic and lifestyle audience characteristics.

The obvious...and an insight

In the most recent research, the single deviation from the norm appears in the assessment of WLNY. Assessed as a cable network, WLNY engendered a relatively low B2MC score. Assessments of the individual shows, on the other hand, provided relatively high KeySpan awareness and imagery scores.

Individual TV shows work nearly as hard as the brands themselves to establish values that (they hope) will become emblematic among the viewing public. For that reason, the B2MC assessment allows us to more clearly understand the degree to which individual shows' values either enhance or detract from the advertised brands' values.

But media is not always purchased on the basis of individual shows. On the basis of our findings, it is clear that cable networks may not have defined their own values clearly enough for the viewing public. Apparently some cable networks have neither found ways to characterize the "values" they seek to represent nor have they successfully or meaningfully conveyed these values to the viewer. For cable networks, relying upon the halo effect of specific shows is a risky strategy because — as we all know — there are only so many *Oprahs*, *Dr. Phils* and *SportsCenters* available.

Additional diagnostics

The brand-to-media consonance model also identifies which of the top four drivers of brand loyalty are the most-highly influenced by the media option. With this information for each of the media alternatives being considered — be it print or Internet, network TV or cable — it is actually possible to select media for an ad campaign on the basis of which option better reinforces the brand's values inherent in the specific copy strategy objective(s).

Empirical proof, practical applications

KeySpan and Brand Keys, Inc. have demonstrated conclusively that the effect of a particular media option — in this case, cable networks — on a brand can extend to the level of the commercials' effectiveness and the brand's ability to connect with the chosen target audience. These are inarguably the factors that are the very raison d'être for the advertising exercise: increase the likelihood a consumer will be aware of a brand, will actually pay attention to the advertising for that brand, and will come away with a markedly favorable impression of the brand being advertised.

These assessments could also be used by the individual media "brands" themselves, not only to provide better guidance for potential advertisers, but also to provide added value in situations, whether or not the CPMs for the alternatives are equal. It is not unheard of — even in our current economy — for clients to actually pay more when they are able to see demonstrable results.

But whatever the organization applying this technique, the brand-to-media consonance model proves that media planners can now be armed with a new metric that can result in superior media plans for their brands, and attendant increased levels of connectivity and effectiveness for their clients. And they can now do it before they spend their money!

[1] These B2MC assessments represent the Total Audience evaluation. BET had been selected as a cable option to reach an African-American target audience. Breaking out African-American evaluations revealed a B2MC assessment of 117.

[2] The only exception to this was WLNY Channel 55, where two specific programs had been scheduled. These were *Oprah* and *Dr. Phil*.

Forget the sharks

Swim with your own fish!

Use corporate ethnography to understand and re-ignite your brand

By Gerry Cain

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In an increasingly turbulent business environment, corporate ethnographic research may just be the tool today's companies need to develop the competitive edge necessary for survival. Marketing organizations of all types are being forced by circumstances (internal and external) to reassess their role as corporate neighbors, evaluate the true value of their employees, and examine the effectiveness of installed marketing processes. Ultimately these reassessments impact the organization's products and services and, of course, its brand.

Previously such internal assessment has been achieved to some degree with the use of qualitative research tools. But focus groups among the organization's employees or internal clients don't quite seem to provide the depth of insight necessary to really break out of a competitive struggle for increasingly discerning consumers, where differentiation among brands is imperative. Here, I see the need for an "emic perspective" or, an ethnographic methodology that examines the corporate community itself along with its worldview.

To use an analogy, qualitative research is akin to taking some fish out of a pond, dropping them in a

fish tank and making assumptions about their behavior based upon a dialogue with them. In ethnographic research, one leaves the fish in the pond, dons a pair of goggles and fins, and jumps into the pond to swim along with the fish. Competitive insight is achieved based upon observation of the fish while allowing them to behave in their own natural environment.

You no doubt have heard the anecdotes of how ethnographic research has been used externally, or among the company's customers and prospects, ethnographically known as the etic perspective:

• how Intuit followed its customers home and, based upon observation of use, subsequently improved its Quicken software product;

• how the beef industry council in observation of women in grocery stores and their preparation habits at home, determined it was necessary to educate consumers who knew very little about the variety of meat available at their grocery counter; and

• how the Bissell, Inc. vacuum company enlisted the assistance of local PTA mothers to develop a persuasive marketing campaign in the launch of its new Steam N' Clean model.

This outside-in perspective has been fruitful for many organizations and most of us are in agreement that ethnographic research can provide insight in the marketing of services and products when the approach is used among customers. After all, just as my Jeep Grand Cherokee resides in my garage, the brand itself resides in my mind and is defined by my perceptions, attitudes, preferences and beliefs of the Jeep product.

But the creation of the physical aspects of the brand, its nuances, its form, and ultimately its inherent strength still remain with its creators, back at the factory shop and in the corporate boardroom. In short, the marketing manager continues to be the caretaker of the brand.

That being the case, marketing organizations must open themselves up not only to what impacts their brand externally, but internally. Ethnographic research within the organizational environment can be instrumental in helping to overcome marketing hurdles, identify opportunities, break down communication barriers and re-invigorate stale brands.

So corporate ethnography provides us added context within which to create and recreate our brand. Following are a few exemplars for your consideration:

• At a General Motors plant, ethnographic research revealed that "workers and supervisors were seven times more likely to assign blame for problems than to offer praise for good work." It also revealed "how blaming patterns followed the flow of work inside the plant." It quickly became apparent why a new quality assurance program was not working in this particular GM plant. While workers were eager to do a good job and receive praise for their efforts, blame was so pervasive that no quality training program could take hold until the plant's cultural realities were addressed.

How effective is your training development when the program doesn't acknowledge subtle cultural differences among different populations within your organization?

• The Canadian central bank's management develops its economic ideology through the generation of a White Book prepared by its in-house economists. However, ethnographic research identified a "strong tacit influence at work in the preparation of the White Book, with the staff inclined to shade their story to accommodate (bank) executives' expectations."

What is the quality of your internal intelligence? As a marketing decision-maker, are you getting the unbiased point-of-view desired to make appropriate policy decisions? Or are you somehow allowing your view of the real world to be shaded, thereby creating an inherent disadvantage to your marketing efforts?

• At Xerox, an anthropological approach to understanding communication processes revealed that product managers were not communicating with each other, just with their immediate staff members. It became apparent that managers working on similar projects were heading in different directions, squandering resources and corporate knowledge. To address this, Xerox managers reinstated department meetings that had previously been eliminated.

How are your internal resources being used? Is the flow of information effective and efficient or are there impediments to the flow based upon built-in corporate policy or process?

Thwart disasters

Recently, countless examples present themselves as to how using an emic perspective in ethnographic research to look at one's corporate communities might have helped thwart near brand disasters. Had some of the following brands examined themselves from within earlier, one does wonder:

• Would the McDonald's brand (and stock price) be at its current low had the company truly understood the internal value of local store input, and how this input (in terms of things like new menu products) was being fed up through the organization through a nationwide marketing intelligence process? Given this insight, would the fast-food giant have released nearly all of its co-op advertising agencies as it did nearly a decade ago?

• Might Kmart have been better positioned vis-à-vis its discount competitors had its internal structure allowed management to accept the nature of its real estate portfolio and its related target markets? Wasn't Kmart ideally positioned to take advantage of the "urban" value these stores inherently provided, as it is attempting to do today?

• Should Disney management have had a better understanding of the impact of watering down Disney's focus with the acquisition of TV networks and other media? Shouldn't management have kept Mickey focused on family entertainment and not "media convergence" as Disney's corporate marketing strategy?

Now more than ever

I'd argue that now more than ever it is imperative that marketing decision-makers swim in the streams of their own organization in an effort to gain insight into their brand and the inherent nature of that brand based upon a greater understanding of the organizational culture itself.

If one accepts that the brand is an expression of our organizational philosophies, its people, its beliefs and processes, then using an ethnographic methodology to examine those organizational structures can be competitively rewarding, if not downright cathartic. In short, to capitalize on your brand's inherent power, you must understand your own organization. For as Marshall McLuhan told us long ago, "The medium is the message."

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Using marketing research —views from a CFO

By Deborah S. Colby

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Market research professionals have all encountered a certain business type: the decision-maker who doesn't see the value of research. We need to give these folks more credit, and focus on the valid question they raise about value.

As CFO of a company, the most important question in my mind when someone comes to me wanting to spend corporate funds is the likelihood that the proposed expenditure will ultimately return more revenue than we pay out (the return on investment). It is harder to measure the return on investment for market research than it is for some other types of intangibles. Unlike advertising, it may be impossible to measure sales before and after the research project is undertaken. Rather, market research is often part of a larger project such as new product development, customer service program management, brand management, etc.

The following guidelines will help research buyers get the most out of their market research budgets.

• *Use carefully designed research to get the facts needed to make good business decisions.*

Cost-effective research is carefully designed to meet the specific decision-making needs of the client. Generalized customer information may be nice to have, but targeted research that seeks answers to specific questions is more likely to yield results that are actionable. A researcher who does exactly what you ask and no more may not be providing the best value. Even when dealing with well-prepared internal

market research professionals, a "value added" research consultant will work with clients to understand the context of the research and suggest ways of getting useful information for decision-makers.

Avoid the temptation to load too many objectives onto a single research project. In an effort to stretch research dollars, there is a temptation to try and accomplish more than one objective in a single study. This can reduce the overall effectiveness of the research. Multiple goals can result in survey instruments that are too long and complex, raising the cost of completing each survey, since it takes longer for a respondent to answer all the questions. It also lowers the percentage of completed interviews, since at a certain point a respondent will bail out rather than give up more of their precious time. Aside from cost, analysis will be lengthier and may not be as narrowly focused if the study is looking at too many disparate questions.

One way to address the need to get multiple objectives accomplished is to conduct some initial research to identify issues and topics where more research could provide the most potent answers. Smaller, carefully crafted studies could be used to zero in on specific questions. A talented market research consultant will have suggestions for using advanced statistical techniques to get good information out of focused, smaller studies, as opposed to loading everything into one large project.

• *Use market research to avoid costly mistakes.*

One useful way to evaluate a market research expenditure is to ask whether it helps avoid costly mistakes. Market research carried out before serious money is dropped on a product or service roll-out can certainly cut down on problems. For example, obtaining feedback from customers or potential customers regarding Web site design allows inclusion of the most desired features and exclusion of content that is extraneous or distracting. Similarly, conducting customer satisfaction research before, during and after instituting major changes in tech support or customer service departments allows them to be tailored to fix the most important problems, and also provides a way to measure the impact of the changes to help make adjustments going forward.

• *Use research to keep existing customers.*

For companies with a solid customer base, retention is critical. It is generally far less costly to keep existing customers than to attract new ones. You don't have to convince existing customers to take a chance on you, to break off existing relationships, or to learn a new way of transacting business. Survey research is a cost-effective way to listen to customer concerns. It enables companies to spot problems before they result in massive attrition, to explore new incentives to encourage customer loyalty, and to segment the customer base to help tailor products and services to a variety of customer tastes or needs.

Retention research may cover a broad range of customers and products or services, or it can be focused on specific high-impact customer groups or profit centers. For companies with a limited research budget, this focus can yield the greatest bang for the buck. Customer satisfaction measurement can be designed to be directly related to retention, or it may be conducted with a more long-range goal of succeeding through a focus on quality.

• *Don't forget the time dimension in planning research.*

Useful research can be made even better by including a benchmark component — some sort of before-and-after that helps identify the impact of a marketing decision on sales, customer satisfaction, revenues or profits. Where there is volatility in the marketplace, the time dimension is even more important. Tracking studies are often used as a scorecard to track changes in customer concerns or satisfaction or interest over time. Another, often overlooked, use of tracking studies is to continually monitor the marketplace to look for trend changes, catch them early, and to adjust company plans accordingly.

The ability to spot changes in the customer base and attitudes can help craft a response to the marketplace. In the early '90s we conducted research where we were able to spot an early change in a trend that helped a client re-focus its marketing strategy. The first cellular telephone users were primarily male, primarily in construction and trades. We noticed that a disproportionate number of new subscribers were female. We were then able to conduct further research that explored women's needs and reasons for subscribing to cellular service, thus helping the client tailor its advertising and service plans to their needs.

• *Use research to identify and develop strategies for attracting new customers.*

Bankers and investors cringe when a company comes to them with a product in search of a market. They want to know who will buy it, how large the potential market is, and how the company intends to reach that market.

One way to use market research is to explore which customer needs the product is going to fill. Of course a company should first explore customer needs on the most basic level, and then think about what types of products or services it might offer that would meet those needs. The reality is that companies often already have a product or service in mind when they conduct research, and are looking for the best way to refine and market it.

Focus groups or in-depth interviews with potential customers can be used to uncover issues, explore what customers think of the product or service and how they think they might use it. This type of research is called qualitative because it is not intended to yield projectable results. That is, it can be used to get a flavor of the market and to find out what people think of the product, but it should not be used to predict potential sales volumes. Qualitative research may serve as an early warning system telling the company that it needs to go back to the drawing board to adapt its product or service to real customer requirements.

It is important to note that amateurishly planned and conducted focus groups can yield some useful results, but with greater care more can be accomplished. Since a high proportion of the cost of a focus group is field facility rental plus incentives for participants, regardless of who is conducting the group, choosing the low bidder is not the best choice if actionable findings and insights are sacrificed.

Assuming product development is complete, quantitative research can be used to explore the size of the potential market, and to identify different customer groups or segments within the market. Quantitative research differs from qualitative in that it tries to use statistical sampling methods to achieve projectable results. For example, in an effort to estimate the size of the market for a new type of loan, a market research study might interview a fairly large group of potential borrowers. Market size research is somewhat like trying to look into a crystal ball to foresee the future — impossible to do with certainty. Yet this type of information is exactly what bankers, investors and corporate decision-makers need.

A good market research firm will work hard on questionnaire design, sample design, sample size, statistical analysis and reporting to provide an estimate of market size that can be used for corporate decision-making. Good research will also point out areas of uncertainty and risk, and a careful researcher will make it clear that the ultimate market decisions are up to the user of the research.

Quantitative research may also be used to segment the market — to identify different customer groups based on a variety of factors from income to annual expenditures on the product or service to comfort level with new technologies. Sophisticated market research will look at whether several factors combine or cluster in a way that describes a market segment. The research can explore these segments in depth — their buying behavior, their attitudes, their reactions to advertising, etc. These are exactly the types of questions that need to be answered in planning how to reach a potential market.

The bottom line is that a company rolling out a new product or service may find that quantitative research is a necessary cost of doing business — necessary to obtain financing in some cases and to obtain internal support for the product in others. Because of the need to survey relatively large numbers of individuals to produce projectable numbers, and because of the professional skill level required for sophisticated studies, quantitative research is generally far more costly than qualitative.

• *Advanced use of market research — building on knowledge previously acquired.*

Some quantitative research can be seen as investing in a map of a new territory — the potential customer base. Once a segmentation study is completed, for example, it can be used as the basis for future exploration of the best ways to serve the needs of each segment, the best way to communicate with each segment, how to maximize revenues through pricing strategies for each segment, etc.

Another dimension that can be explored using market research is change over time. A variety of tracking studies can look at issues from customer awareness of advertising, products, brand names, etc., to customer satisfaction with prices, products, services. The temporal dimension can also be added to segmentation studies, serving as a way to keep the map up to date and useful.

For a company that has enjoyed success using market research, building on that research is a cost-effective way to keep providing useful information for management. At its best, qualitative and quantitative research are tools that can be used to quickly and deftly react to changes, opportunities and risks in the marketplace.

Focus on fundamentals

The key is to focus on the fundamentals. For marketing professionals, this means returning to the basics of pleasing the customer and meeting marketplace needs. For market research professionals, this means getting and giving the most value for each research dollar. Research is an important tool for business. The type of research should be carefully chosen, designed and conducted with the goal of obtaining useful and insightful results.

Reconciling data and meaning across different surveys

By Elizabeth Bergman

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Collecting customer satisfaction data has become ubiquitous across the corporate world. The data collection effort is so pervasive that conflicts can arise when departments in companies have differing satisfaction results. I was on the client side for many years and recently saw the negative effects of such conflicts: "interpretation" turf wars, endangered research budgets, and ultimately discrediting of customer data collection efforts.

The purpose of this article is to provide guidance to corporate managers trying to understand how to use and reconcile multiple and different surveys conducted across the organization. In other words, can survey results from different instruments be viewed in tandem, or must they be understood separately, and if so, how, why and to what effect?

The company in this case study is a leading software manufacturer where I worked for some time. This company has a number of different surveys touching customers at different points in the product life cycle. Customers are surveyed after a product is shipped, when a problem is fixed, after a consulting engagement, and annually regard-

ing their overall experience with the company. In and of themselves, each of these surveys provides a useful bit of information. At almost any point in the company's product life cycle management can tell how the company performed for the customer. However, managers frequently engaged in "data posturing" to insulate themselves from criticism about their own scores. Common questions were: "Why are your survey's scores of me lower than my survey's scores?" and "How do we correlate the two surveys?"

The answer is that each of these surveys had been crafted to present specific information, and should likewise be used for only those purposes, otherwise methodological problems such as validity and reliability can allow management to draw inaccurate conclusions.

Validity, reliability and time

First, we tackle the issue of validity. In the case study company, two surveys were at issue, one originated by the customer support organization (CSO), a high-volume call center; the other by the customer satisfaction and corporate planning department (CSCP). Both measure customer satisfaction, albeit for different purposes. The CSO survey is a trailer survey and as such is designed to explore the customer's experience with a transaction or at the end of an engagement. The CSCP survey is a relationship survey designed to cover a broad range of questions, painting a picture about the customer's whole experience with the company. Relationship surveys have a battery of questions created to understand what drives customer loyalty and customer retention.

One can imagine how problematic it would be to use a transaction survey to predict loyalty, and likewise how difficult it would be to ascertain transaction effectiveness from a survey about a customer's overall relationship with a company. Information derived for one purpose would be used for another purpose; this is a problem of validity. For example, a measure of a subject's psychological reaction to a package (e.g., pupil dilation) does not constitute a valid measure of purchase intention. "By validity we mean the extent to which our measurements reflect *what we intend them to*, or what we claim they do." (Kachigan 1986:219, italics in the original).

Next, the issue of reliability. Reliability applies to a measure when similar results are obtained over time and across situations. Two dimensions underlie the concept of reliability: repeatability and internal consistency. Repeatability refers to the test-retest method of administering the same scale to the same respondents at two separate times to test for stability. This is critical and was clearly not the case with the CSO and CSCP survey instruments and methodology; the scales were different and the respondents were different. Internal consistency refers to the homogeneity of a measure, which is the idea that measuring an attitude may require asking several similar questions. While this was also not the case across the two survey instruments, it is the lesser of the methodological problems and not the focus here.

For our purposes, the question about how to correlate the two surveys raises the issue of repeatability. "The correlation between successive measurements on a set of objects with respect to a variable is referred to as test-retest reliability." (Kachigan 1986)

According to statisticians, an unreliable set of scores — a set of scores that do not correlate with themselves upon re-measurement — is essentially equivalent to assigning the scores to the objects in a purely random manner. "How could a randomly assigned set of scores possibly correlate with another set of randomly assigned scores? It would be like trying to correlate two columns of random numbers." (Kachigan 1986)

While the case study company did not, separately, have unreliable scores in the CSO and CSCP surveys, it did create the situation of unreliability when trying to merge unlike scores. Attempting to correlate unreliable variables will produce exactly the same result, a zero correlation — "A chain is no stronger than its weakest link. So just as a measurement system can have no validity if it has no reliability, the degree of validity is *limited* by the degree of reliability." (Kachigan 1986)

Finally, there is the issue of temporal variation, that is, surveys that are done at different times of the year and at different points in the customer's interaction with the company. "In many cases, such as equipment and other durable products, customers use products over a relatively long life cycle (usually in years) made up of a sequence of distinct phases. These products may require the investment of significant resources by the customers and the longer the life of the product the greater the potential for customer satisfaction to change (usually decrease) over time." (Ramos 1996) Furthermore, time lapse influences ability to properly remember and communicate specific factors, and if the time between measures is long, there may be attitude change or other maturation of the subjects. Thus, a transaction survey done immediately after the relevant event will likely have higher scores than relationship surveys done later in the product life cycle.

However, for present purposes to illustrate a point, we will suspend belief and ignore the earlier question of whether a randomly assigned set of scores can correlate with another set of randomly assigned scores. We in fact force the correlation of two columns of arguably random numbers. Data from the 2002 CSO survey and corporate survey were merged and analyzed. The results indicate that there is no significant relationship between the corporate measure of CSO overall satisfaction and CSO's own measure of overall performance. The correlation coefficient of .103 is not significant at a p value of .111.

Next, a bivariate regression was run and plots were created to further test the relationship between CSO customer satisfaction and the corporate measure of CSO satisfaction. In other words, does one drive the other? Is one the predictor of the other? CSO customer satisfaction is modeled as being dependent on the corporate CSO measure. Results indicate that about 1 percent of the variation (r-squared of .011) in CSO's scores can be explained by the corporate measure. This is a very weak result. Furthermore, the F-statistic is very low at 2.55 and not significant, indicating that this is not a very good model for explaining CSO satisfaction. Finally, regression coefficients and P-plots indicate low correlation between the predictor and criterion variable; indeed the assumption of a normal distribution and linearity is questionable. Therefore, it would not be correct to say that an increase in corporate satisfaction will result in an increase in CSO satisfaction or vice versa.

(Note: similar results were obtained when using the corporate customer satisfaction "overall performance" variable instead of the corporate CSO satisfaction variable. Additionally, the CSO variable was used as the predictor of both corporate overall and CSO satisfaction to no different effect. All permutations of the equation were insignificant.)

Therefore, for reasons of validity, reliability and temporal variation, comparing customer surveys across functional areas within the company should be done with a cautious eye and only to illuminate directional trends in customer data. Causality and correlation across survey instruments and output with different scales, respondents and time periods is suspect.

Scale issues

But what about the other question: "Why are your survey's scores of me lower than my survey's scores?" This too may be a function of misunderstood methodology - or trying to compare apples to oranges. However, before tackling the negative aspects of fruit comparison, let's examine the positive possibilities of data comparison.

As mentioned in the last section, comparing customer surveys across functional areas within the company can be done to illuminate directional trends in customer data. This view is shown in Figure 1. The CSO survey and the CSCP survey (referred to as "corporate") question counterparts are plotted for one quarter in 2002. While the scores are slightly different for each question, the trend between the two surveys clearly follows a similar pattern. Scores that are high for the CSO survey are also similarly high for the corporate survey; likewise, dropping CSO scores are mirrored by dropping corporate scores. This is true for all questions except 31H on e-support effectiveness, which shows a virtually identical score in the two surveys.

While the scores may be slightly different on similar questions in the CSO and corporate surveys, the similar data pattern between the two surveys tells us that what customers rate as important appears to be mapping across customer groups exposed to the company. Customers want to reach the company quickly and have a quality resolution to their problem. The time it takes to get to that resolution is somewhat less important than providing them with quality service.

Figure 1 – Company X Percent of Customers Satisfied

	29. Overal	31a. technica	31b. Courtes	31c. Ability.	31d. Time/re	31e. Time/re	31f. Quality	31g. status	31h. Esuppo
CSO Trailer	94.0%	94.1%			95.5%	92.3%	94.3%	95.3%	69.1%
Corporate	84.8%	83.8%	95.2%	83.8%	83.4%	78.9%	85.7%	82.1%	74.1%

Now let's return to the issue of score comparison and the differences between the CSO and corporate surveys. First, it should be noted that the scales for the two surveys are different. CSO is using a seven-point scale and corporate is using a five-point scale. While two points does not seem like much, in actuality the scale differential accounts for 10 to 15 percent of the "percent satisfied" score discrepancy and almost 17 points because of the normalization process used by the company in creating score indices. This is possible because of the different point values associated with each increment value in the inflated normalized 0-100-point scale. Inflating the seven-point scale causes each increment to equal 16.66 points; in the five-point scale each increment equals 25 points.

In the corporate survey more than 60 percent of customers rate the company a "4" or "very good." The normalized score index (NSI) conversion for a respondent selecting 4 on the corporate survey is 75. Similarly, for respondents desiring to rate CSO "next to highest" or a 6, the NSI conversion is 83.3. Because of the index inflation factor the two-point scale differential turned into an eight-point difference between the two respondents giving the company the same rating. When this effect is aggregated it can be exacerbated.

Let's look at what happens when we take 10 respondents who use the 3 and 4 or "good" and "very good" on the corporate survey, and 5 and 6 on the CSO survey. The CSO survey scale uses "very important" for the 7 rating only. One can generally assume that anything above a 4 in a seven-point scale is a "good" rating. Thus, we can assume that the 10 respondents in this example desired to rate their experience as "good" or better. As we can see, 10 individuals wishing to designate an organization or department as good or better will rate CSO a 74.97 and corporate a 62.50 in the aggregate — a 12.47-point difference.

CSO	Corporate
Select 5 & 6 rating	Select 3 & 4 rating
66.64	50
83.3	75
66.64	50
83.3	75
66.64	50
83.3	75
66.64	50
83.3	75
66.64	50
83.3	75
74.97	**62.5**

As Myers (1999;192) notes, "constructing an index that is accurate, fair, and sensitive is more difficult than it might seem. Management has many options in designing an index, but some options can lead to consequences that were not intended." That is the crux of the issue at the case study company and it suggests that research managers would do well to remember and reinforce the intent and purpose of company survey(s). In CSO the objective was to monitor help-desk performance and pay bonuses; in CSCP the objective was to ascertain customer loyalty and create programs to increase customer retention. The latter sought to reveal a few key drivers from a myriad of attributes; the former sought score movement. Thus, company management was in the crosshairs about irreconcilable objectives as much as score differences.

It is worth noting that "moving the needle" is a common problem in customer satisfaction measurement programs. It occurs because most programs are based on repeated surveys of samples of customers, usually at frequent intervals, and any changes are found to be minimal. The difficulty, in part, is due to rating scale insensitivity. This causes both management and employee frustration and can serve to undermine compensation plans based on insignificant or immovable customer satisfaction targets. While there is no simple solution to this problem, there are ways to minimize it. One way is to increase scale sensitivity by expanding or lengthening the range; from a five-point to a seven-point or from a seven-point to a 10-point. Short scales are typically not sensitive enough for use in repetitive customer satisfaction surveys due to the "satisfied customer" phenomenon — present customers, by virtue of that status, tend to be reasonably satisfied or they would not be customers.

How should it be viewed?

How then should the CSO customer support survey data and the corporate customer satisfaction survey data used in this example be viewed by management — in tandem or separately?

The short answer to this question is that all surveys done by the company must be viewed as output from the instruments for which they were designed. Survey results do not mix; they provide unique, application-specific snapshots, if you will. The CSO and corporate surveys provide two views of the company. The CSO survey is a trailer survey and is a transactional, functional, process measurement offering indicators and guidance in efficient unit operation. The corporate survey is a relationship survey providing a corporate-wide view of all business units and most functional areas within the company. Research managers must understand and reinforce survey objectives — an effort requiring ongoing information dissemination and education.

This perspective on, and utilization of, the customer satisfaction data will afford companies a much more productive management tool than trying to engage in head-to-head comparisons of output across functional areas. Each survey that is done offers information on another piece of the customer's experience. The pieces are not mutually exclusive but rather paint a picture of the whole product life cycle experienced by the customer. Different scores from different instruments do not produce irreconcilable results; one is not right and the other wrong. Each tells a part of the customer's story.

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ADVERTORIAL

ANOTHER LINE IN THE SAND

The widening gap between focus group facilities

By Ted Donnelly, Ph.D.

Editor's note: Ted Donnelly has a research Master's in Business and a Ph.D. in Consumer Behavior and Advertising Research.

The client enters your facility about three hours ahead of his scheduled time (he caught an earlier flight). He informs you that he has no idea of how many observers will be in attendance. The stimulus to be tested has not yet arrived (he needs color copies ASAP). Twelve clients suddenly walk in to watch his facilitation....ALL want to get online, and nothing slower than broadband, please. Two are vegetarians, one has an allergy to seafood, three are on Atkins, and all want Starbucks!

NO PROBLEM...NO PROBLEM...NO PROBLEM!

Welcome to qualitative research in the year 2003. This is the real world, and yes, they really do want their Bananas Foster made with 2% milk and the bananas served on the side. No more handwritten grids, no more 1-2-page screeners, no more tap water, and no more excuses. Today's average focus group roster may include a wish list as exclusive as a State Dinner at the White House. Personality segmentation, algorithmic formulas, and convoluted quotas are all now the norm.

I am in the unique position of being a moderator employed by a company that owns a 6-suite facility. As Director of Research, I oversee projects from the facility side as well as the research end. On the research design side, I moderate both within our facility and beyond. Consequently, I have been on both sides of the proverbial coin. As it were, I feel as though I have a pretty strong grasp as to what clients want, need, expect, and for the most part, are willing to pay.

It is not a "six of one half a dozen of the other" environment anymore. That is, there appears to be a widening gap amongst focus group facilities: the 25% who can keep up with the pace and the vast majority who flounder in an oblivious haze of mediocrity. What is parting the seas between the *Cans* and the *Cannots* is service quality? With project complexity on the rise, more responsibility rests with the facility's project manager. No longer can they just blindly recruit according to specifications. Rather, a good manager will work with the client to develop an understanding of the research objectives so that they can more effectively target the appropriate audience for the groups. However, this is only the first step. Service quality is key and it runs from the project manager right down to the whipped cream on the strawberries.

Accordingly, we have developed a client Declaration of Rights:

1. **The clients have the right to receive a reply for bid requests within 1-2 hours.**
2. **The clients have the right to receive recruiting updates on a daily basis.**
3. **The clients have the right to have their screener scrutinized for comprehension.**
4. **The clients have the right to a project manager that is committed to understanding the nuances of their project.**
5. **The clients have the right to have dialogue with the project manager almost any time.**
6. **The clients have the right to NOT have to manage the project manager.**
7. **The clients have the right to interface with the exact audience that they paid to have recruited.**
8. **The clients have the right to have as many hosts/hostesses as necessary to properly service their project.**
9. **The clients have the right to have respondents properly re-screened.**
10. **The clients have the right to only have to ask once.**
11. **The clients have the right to NOT have their research compromised by incompetent facilities.**
12. **The clients have the right to creature comforts when they are road weary.**
13. **The clients have the right to service above and beyond.**

As marketing researchers, we are in the service industry. Is service quality really too much to ask?

Not sure about "don't know"

By Randall K. Thomas

Migrating phone surveys to the Internet

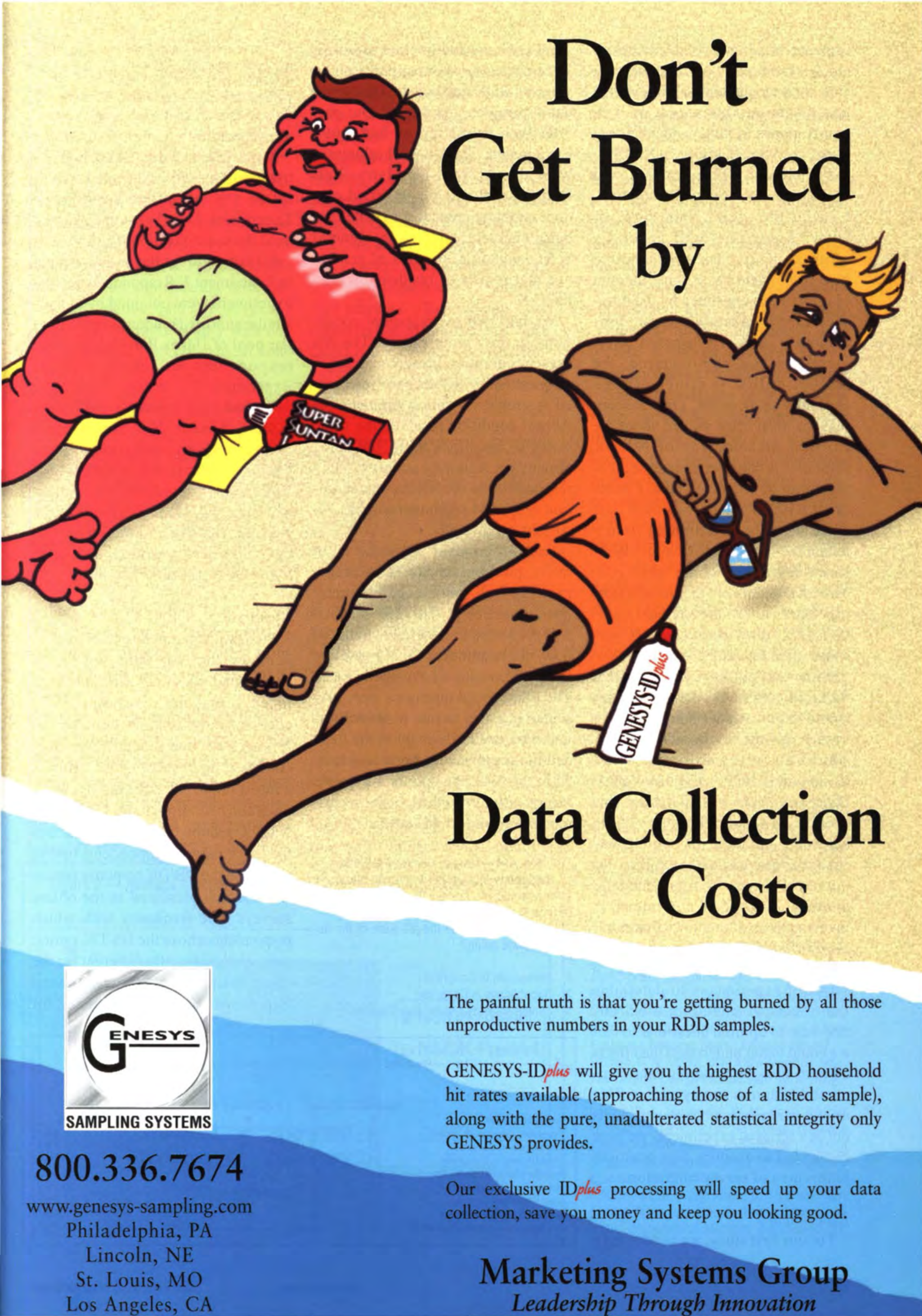
By Randall K. Thomas

Editor's note: Randall K. Thomas is senior research scientist at Harris Interactive, Rochester, N.Y. He can be reached at 585-214-7250 or at rthomas@harrisinteractive.com. Portions of this article are based on a conference presentation at the American Association for Public Opinion Research, 2002.

The growth in the United States of market research utilizing Web-based surveys has been phenomenal over the past five years, with gross revenues rising by 20-fold. As a modality for information gathering, the Internet may be unsurpassed in giving us the ability to present questions and multimedia experiences to people widely scattered across geographic location and then find out how they respond quickly and inexpensively.

A significant portion of Internet-based research has involved transitioning tracking surveys that have been administered through non-Internet modalities (most often RDD telephone surveys). Many clients have conducted tracking interviews by telephone and are staunch believers in probability-based sampling approaches to information gathering. However, they have begun to realize that conducting Web-based interviews could bring them cost savings, enhanced capabilities, and rapid turnaround for research on widely dispersed or hard-to-reach people. These factors, combined with the potential for improved accuracy of measurement, have led them to migrate their trackers to the Internet.

A common purpose of a tracker is to gauge a general population's opinions based on a sample of that population and track changes in that population's interests and behaviors. Many factors affect the researcher's ability to generalize findings from a specific sample to the larger population of interest to the client. One factor that threatens generalizability is survey non-


Don't Get Burned by Data Collection Costs
SUPER SUNTAN
GENESYS-IDplus
The painful truth is that you're getting burned by all those unproductive numbers in your RDD samples.
GENESYS-IDplus will give you the highest RDD household hit rates available (approaching those of a listed sample), along with the pure, unadulterated statistical integrity only GENESYS provides.
Our exclusive IDplus processing will speed up your data collection, save you money and keep you looking good.
GENESYS
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www.genesys-sampling.com
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St. Louis, MO
Los Angeles, CA
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response, which has received considerable attention by us. Another possible threat to generalizability is item non-response. One aspect of item non-response is how to handle "not sure" or "don't know" (NS/DK) responses. Telephone-based approaches do not typically explicitly offer the option "not sure" or "don't know" but will generally accept such a response if volunteered by a respondent (with some amount of effort often expended by the interviewer to minimize item non-response). Since Web-based interviews are self-administered, the NS/DK option is either offered explicitly or it is not. One concern that has been often voiced about the explicit presentation of NS/DK responses is that it will decrease comparability to telephone data. Clients often wish to retain historical data when they are transitioning from a telephone-based approach to a Web-based approach. We are often concerned about how to maintain historical trends for opinion-related questions (e.g., product satisfaction, purchase intention, etc.).

Some authors have believed that including these NS/DK responses would improve data quality by reducing the pressure to provide opinions when no true opinions exist (Converse, 1964; 1970). However, Dillman (2000) has indicated this area in particular has very little empirical guidance to help survey researchers understand how to migrate a survey from one mode to another. As part of our intensive investigations of practices that minimize differences between phone and Web-based surveys, we conducted a series of experiments to determine the effects of including a NS/DK response to opinion questions so that we could better understand the effects of item non-response on data comparability across survey modes. This article summarizes two experiments out of a series of experiments we have conducted to examine best practices in this area of survey migration.

Experiment 1

For our first study, we conducted a parallel phone and Internet survey in December, 2001. For our phone study we used RDD and had 1,011 respondents complete the survey. Our parallel Web-based survey had 2,098 participants. Their e-mail addresses were drawn from the Harris Poll Online panel using a stratified random sampling procedure to match the basic characteristics of the general U.S. population in terms of gender, age and region of residence within the U.S.

We had two experimental conditions in the online survey. The NS Present condition presented a series of questions with "not sure" presented as a response option while the NS Absent condition received the same series of questions with "not sure" absent. We randomly assigned 1,044 respondents to the NS Present condition and 1,054 respondents to the NS Absent condition.

Each respondent answered eight rating questions using a four-category rating scale (poor, only fair, pretty good, excellent). The first question was presented in isolation and asked how the respondent would rate the job performance of President Bush. The other seven questions were presented in a grid format with each target to be rated presented in the rows and the response categories presented in the columns. Figure 1 presents the questions used in both experiments reported in this article.

Figure 1 — Questions Used in Both Telephone and Online Survey Versions

1. How would you rate the overall job President George W. Bush is doing as president?
2. How would you rate the job each of the following is/are doing?

1 Democrats in Congress
2 Republicans in Congress
3 Senate Majority Leader Tom Daschle
4 House Speaker Dennis Hastert
5 Vice President Dick Cheney
6 Secretary of State Colin Powell
7 Secretary of Defense Donald Rumsfeld

Experiment 2

Experiment 2 involved a Web-based survey and took place in parallel to our telephone survey and Experiment 1. In Experiment 2, we used the same questions (attitude targets) as we did for the online version in Experiment 1. Respondents for this experiment were obtained by using a similar stratified random sample from our pool of Harris Poll Online panel respondents as described for Experiment 1.

We had three primary conditions – NS/DK Absent, Not Sure Option Present (NS Present), Don't Know Option Present (DK Present). Of our 5,972 total respondents, we randomly assigned 3,922 respondents to the NS/DK Absent condition, 1,024 to the NS Present condition, and 1,026 to the DK Present condition.

Results

First, we examined for differences between the Not Sure and Don't Know conditions in Experiment 2 and failed to find any significant differences in endorsement patterns or differences between means. We then collapsed the results for Experiment 2 into a single NS/DK Present condition and we report the combined NS/DK groups. Table 1 summarizes the percentage of respondents opting to choose the NS/DK response option when it was presented in the online surveys. The frequency with which respondents chose the NS/DK option was not significantly different for the eight items when we compared Experiment 1 with Experiment 2 for

Table 1 — Percentage Choosing Not Sure or Don't Know Response Option

	Telephone Survey		Experiment 1		Experiment 2	
Attitude Target	**N**	**%**	**N**	**%**	**N**	**%**
President George W. Bush	15	1.5%	13	1.2%	17	0.8%
Democrats in Congress	92	9.1%	108	10.3%	228	11.1%
Republicans in Congress	93	9.2%	111	10.6%	219	10.7%
Senate Majority Leader Daschle	222	22.0%	207	19.8%	390	19.0%
House Speaker Hastert	390	38.6%	323	30.9%	631	30.8%
Vice President Cheney	143	14.1%	133	12.7%	250	12.2%
Secretary of State Powell	51	5.0%	47	4.5%	80	3.9%
Secretary of Defense Rumsfeld	94	9.3%	66	6.3%	147	7.2%

each item.

We calculated means for each of the questions and analyzed for differences as a result of experimental condition. Results for weighted data are reported in Table 2. In Experiment 1, six of eight means of the NS/DK Present were not significantly different from phone data using weighted data. For Experiment 2, five of eight means of the NS/DK Present condition were not significantly different from the phone data for weighted data. This contrasts sharply with our findings for the NS/DK Absent conditions. In Experiment 1, all of the means for the NS/DK Absent condition were significantly different from phone data and this was replicated in Experiment 2.

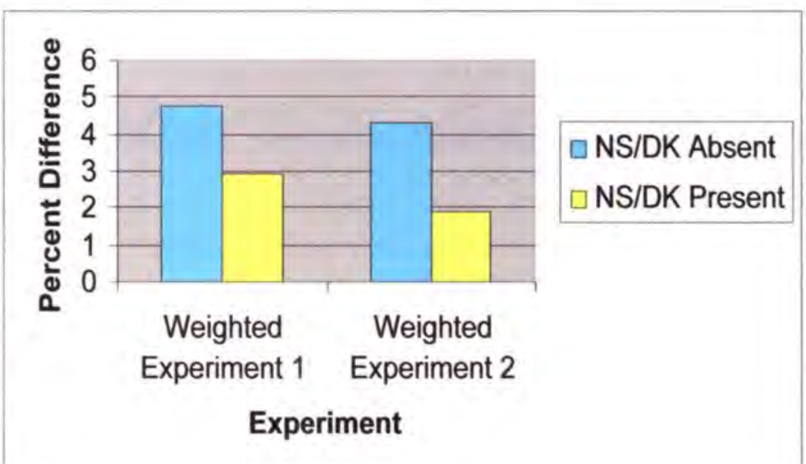
Table 2 — Means by Experiment and Condition – Weighted Data

Attitude Target	Phone	Experiment 1 NS/DK Present	Experiment 1 NS/DK Absent	Experiment 2 NS/DK Present	Experiment 2 NS/DK Absen
President George W. Bush	3.25a	3.26a	3.10b	3.23a	3.19b
Democrats in Congress	2.61a	2.48b	2.45b	2.52b	2.40c
Republicans in Congress	2.66a	2.61a	2.46b	2.57b	2.55b
Senate Majority Leader Daschle	2.69a	2.47b	2.46b	2.54b	2.46c
House Speaker Hastert	2.67a	2.64a	2.53b	2.65a	2.52b
Vice President Cheney	2.97a	2.94a	2.78b	2.92a	2.79b
Secretary of State Powell	3.39a	3.38a	3.23b	3.37a	3.22b
Secretary of Defense Rumsfeld	3.27a	3.28a	3.10b	3.26a	3.13b

Note: Means sharing a common subscript within the same row do not differ significantly at $p < .05$.

Figure 2 presents results for the two experiments in terms of the average proportion of endorsement difference (using weighted data). To calculate this we took the percentage of respondents who endorsed each response category for each question and subtracted it from the endorsement percentage for the telephone survey. We then took the absolute value of each difference and then averaged within conditions. Using a chi-square test, we found that the difference between the NS/DK Present and NS/DK Absent conditions was significant for both experiments. When the Not Sure or Don't Know category was absent the average percentage deviation from the phone was 4.77 percent and 4.28 percent for Experiments 1 and 2, respectively. When the Not Sure or Don't Know category was present the average percentage deviation from the phone data was 2.92 percent and 1.87 percent for Experiments 1 and 2 respectively.

Figure 2 — Average Category Percentage Difference from Telephone Survey



Discussion

Of the many difficulties encountered when trying to create an online survey comparable to a phone survey, perhaps none is so vexing as trying to find the right set of responses that will parallel endorsement frequencies obtained in the phone survey. These two experiments begin to illuminate how possible variants will affect their comparability. We found that the presentation of a "Not Sure" or "Don't Know" category for opinion questions presented online is more likely to yield data comparable to that found by way of telephone data. These results add to our growing knowledge about how to mount surveys in other modalities and obtain comparable data. We are currently conducting further experiments with parallel telephone and Web survey components to extend these findings.

Some limitations of the current study should be noted. First, these findings may hold only for attitudes and not for other types of questions (e.g., behavioral). In addition, another commonly used procedure to avoid item non-response is to present a familiarity screen. This procedure first asks which topics a person is familiar with and then presents only those topics with which he/she is familiar for subsequent questions. Since this procedure affects the basic structuring of the questions it may also affect data comparability and will also need to receive further study. Finally, while we investigated how the inclusion or exclusion of the NS/DK category affected comparability of data in two different modes, it didn't address if the data was more or less valid with the inclusion of the NS/DK category (see Krosnick et al., 2002).

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Nothing to fear

Time-saving tips for conducting secondary research

By Trudy Ann Brandenburg

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The beads of sweat form on your brow and begin to trickle down through your eyebrows as you listen to what your client needs. "How am I going to find this information?" you ask yourself. "They want this by next week and I don't even know where to start."

Not to worry. Doing secondary research is nothing to fear. If fact, it can be fun, like a treasure hunt. Gathering and summarizing secondary information can be done easily if you break it down into steps.

First, make sure you understand the exact information your client (whether it's an internal or an external one) is seeking and understand the audience that the final report and information will ultimately be going to. If you don't understand exactly what's expected, go back and talk to the person requesting the information until you do understand his or her needs. Do not be embarrassed by asking what you may feel are stupid questions. You may appear stupid later if you don't ask the questions up front! Take notes during the request and keep referring back to the original notes while you're doing your research. You'll be less likely to stray from the subject by continually focusing on the specific request.

Second, talk to other people. They may already know an answer you need or they may be able point you in the right direction.

Third, do a literature search for articles in newspapers, periodicals

and trade magazines about your topic. You can do this online through most public libraries and it is normally free. All you need is a public library card. Contact your local library for more information. And do not forget to talk to a librarian about the information you're looking for. They are often a forgotten jewel in our age of the Internet, but they are professional researchers that are friendly and willing to help.

Some other sites with free and reliable sources of information are Yahoo News (http://news.yahoo.com), Excite News (http://news.excite.com), www.prnewswire.com, and www.businesswire.com. Other sites include www.cnn.com and www.msnbc.com for up-to-date headlines and search features. Many local newspaper sites also offer free access and a searchable archive.

If you have account access to informational databases, such as Lexis-Nexis, Dialog, or Factiva, you can also use these powerful tools for article and company information searches. These are valuable resources, but they may not be available to you because of required contractual agreements and costs.

Articles contain valuable information and may include Web sites and quotes from reports that may have been written on your topic. Many times information is provided about how to get additional reports. Articles also contain contact names for companies. Professors and associations are also often listed that you may find helpful for more information. The reporter's or author's name is normally listed in the article containing contact information. These people can often help you with your project. I have discovered that research and educational professionals are extremely open to providing help.

Although the Internet is one of the most valuable tools in research today, it can be cumbersome if you don't know exactly where to go. You can search for days, and even though the information may be available on the Internet, you may never find it. Having a specific URL may be helpful to cut down on your surf time on the Internet. Magazines and books written like telephone directories listing specific URLs are also available at local libraries or can be purchased at book stores.

If you're researching for information on a specific company, begin at the company's Web page, but don't use company Web site information alone. Remember, they will be less likely to post any negative information on their Web site.

If you don't know a company's Web address, then do a search using a browser, look it up on a browser or simply guess. Most company URLs are (the company name).com.

Don't get so caught up in finding information that you run out of time to read what you've found and write your report. Secondary research can lead you down many twists and turns, but you have to set a "stop researching" deadline. Accept the fact that you will never find everything about your topic.

After you've collected as much information as possible, read through it, highlighting specific text you will need. As you read, various trends will emerge and help you begin forming the idea for the layout of your report. Make notes in the margins and use Post-it Flags and Post-it Notes. Hang these off the side of your paper to label your information for the appropriate report sections. This will make writing your summary report much easier.

If you've done a large amount of research and are unable to find the requested information, be honest and tell the client as early as possible. If a report is still required, state why you were unable to find the information. Don't pad your report with superfluous findings. Glossing over the specific questions with a large quantity of data rather than quality information will get you and your client nowhere. Sometimes, secondary information is simply not available, especially if you are researching privately owned companies. It is up to you, the researcher, to help your client understand this.

Write your summary report in sections, state the specific question or parts of the question you are answering as your report headers. Always date your report and always, always, always source your information. Keep a copy of all the information you used in the report in a binder, sectioned the same way that your report was written. Make sure you put your contact information on the report in case someone needs the full text of an article or more information.

When typing your report, make sure it is grammatically correct, easy on the eye, and easy to understand. Use graphics, but not too many. Technical reports with cutesy graphics may degrade the value of the report. Graphs and charts may make some information easier to understand while making other information more confusing. Mainly, know the audience that will be reading the report and write for their preference.

Include an executive summary and finish your presentation with a catchy, but not busy, cover. Make sure you have other pairs of eyes look over your report before you give it to your client.

Lastly, give your report to your client with confidence, knowing that you have done your best work. Ask for their honest feedback. This will only help you conduct better secondary research, improve your report writing, and enhance your skills, services, confidence, and possibly even your income!

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additions to the list of 60 included Andersen Worldwide, Verizon Communications, PepsiCo, SBC Communications, Qwest Communications, Adelphia Communications, Global Crossing, J.C. Penney, General Mills, Merrill Lynch, Harley-Davidson, American Express and Eastman Kodak.

As in past years, the nominations phase for the 2002 study revealed that nominations do not tell the whole reputation story. Four of the Top 10 companies nominated in the "best" category also appeared on the Top 10 list in the "worst" category: Wal-Mart, Microsoft, Ford and AT&T.

This study of corporate reputation was carried out in two phases: a nomination phase from April 9 to September 3, 2002, and a rating phase from September 23 to October 16, 2002.

In the first phase, Harris Interactive conducted 4,007 online interviews and 4,055 telephone interviews throughout the United States. Both online and telephone surveys were conducted. All respondents were asked to nominate two companies that they felt have the best reputations overall and two companies that they felt have the worst reputations overall. Nominations were open-ended. Any nominations of wholly-owned subsidiaries or brands were collapsed within the parent company (e.g., Ben & Jerry's under Unilever). Companies with nominations that came predominantly from one region were classified as regional and were removed. Governmental agencies and departments were also removed. Harris Interactive made these adjustments because it wanted the study to focus on companies that report financial results and on companies that operate nationally, unlike some regional telecommunication and cable companies.

Harris Interactive then constructed a list of 60 companies named most often by the respondents in the first phase by summing the "best" and "worst" nominations for each company and rank-ordering the companies based on the total nominations. In the second phase, 22,521 randomly selected online respondents were asked to do a detailed rating of one or two companies with which they were "very" or "somewhat" familiar. Respondents rated companies on 20 attributes in six key dimensions: products and services, financial performance, workplace environment, social responsibility, vision and leadership, and emotional appeal.

Each of the 60 companies was rated by an average of 617 respondents. All data were weighted to be representative of the total U.S. adult population. Weighting variables for this study included demographic variables for age, sex, education, race, ethnicity, household income, and region; non-demographic variables (i.e., stakeholder status, and stated importance of the reputation dimensions to overall reputation); as well as a measure of one's propensity to participate in online studies in order to project findings to the U.S. adult population.

Finally, reputation quotient figures were calculated for each company to determine the rankings. Each company's RQ is based on the respondents' ratings of each company on the 20 attributes. The highest possible score is 100. Each RQ rating has an estimated sampling tolerance of +/- 1.5 percentage points. In comparing any two RQ scores, a difference of 1.96 percentage points would be considered significantly different at the 90 percent confidence level. For more information visit www.harrisinteractive.com.

Asians consuming more dairy products

Asians are consuming more milk and other dairy products than ever before, according to findings from Taylor Nelson Sofres' (TNS) Asiapanel. Revealing growth in the dairy sector to be strongest in China and Taiwan, the Asiapanel findings also reveal an Asia-wide trend in favor of liquid over powdered milk as the health benefits of drinking milk become increasingly acknowledged.

Leading Asia in their consumption of dairy products are Japan and Korea with nearly all households having bought dairy or milk products in a given quarter. In contrast, Malaysia continues to be amongst the lowest consumer of dairy produce in Asia with little more than half its households (58 percent) purchasing any and just 74 percent purchasing milk.

Although not a country traditionally associated with consumption of dairy products, China's burgeoning dairy market has seen double-digit year-on-year growth — particularly in sales of liquid milk. Standing at a penetration level of 90 percent, liquid milk outstripped all other beverage categories in terms of rate of growth across China's major cities in 2001, with double the growth of the next most fastest growing beverage category, bottled water.

Interestingly, the premium priced category of yogurt and yogurt drinks emerged as a prevailing force in Asia's dairy product market. The dominant sector within the Korean and Thai markets, yogurt and yogurt drinks were purchased by 85 percent and 75 percent of the population respectively in Q4 2001. In Taiwan, where 72 percent of households purchase dairy products, yogurt and yogurt drinks not only account for nearly one quarter (24 percent) of the total market for dairy products but also showed amongst the highest year-on-year growth for any grocery category in 2001.

"The younger generation of Asians seems to recognize the health benefit of dairy products and are changing their eating habits," says Helen Passingham-Hughes, managing director of TNS Asiapanel network. "Furthermore, Asian mothers, in particular Chinese, appear to want their children to grow up to be big and strong."

The research also revealed that the market for ready-to-drink tea in Asia has grown significantly in 2001 where, for example, in Thailand, it now makes up 40 percent of the total tea category and is driving total tea growth. In Korea, tea enjoyed one of the highest value growths — an increase of 25 percent, by attracting more buyers into the category. Similarly in Thailand, the fastest growing beverage categories by value are non-carbonated drinks and tea — up by 38 percent and 32 percent respectively.

"The popularity of ready-to-drink tea can be attributed to society's growing need for speed and convenience, coupled with increasing health consciousness in Asians. There appears to be strong growth potential in the next year for the ready-to-drink tea market in Asia," says Passingham-Hughes. For more information visit www.tnsofres.com.

Top traditional advertisers increase share of online ads

Top Online Ad Formats* Used by Top 100 Traditional Advertisers (Q4, 2002)

Rank	Ad Format	Percent Share of Selected Advertisers' Impressions (%)	Number of Top 100 Advertisers
1	Full Banner	29	92
2	Non-Standard (Large Size)	16	80
3	Half Banner	10	84
4	Rectangle	10	68
5	Medium Rectangle	9	79
6	Skyscraper	8	87
7	Vertical Banner	4	82
8	Wide Skyscraper	3	73
9	Large Rectangle	3	66
10	Vertical Rectangle	2	58

Source: Nielsen//NetRatings, Q4 2002
**Note: Excludes small ad formats such as Micro Bars and Buttons.*

New York-based Nielsen//NetRatings reports that the top 100 traditional advertisers increased their share of online advertising and are leading the way for bolstering the online medium. The top traditional advertisers comprised more than 30 percent of the online advertising market by the end of 2002, as measured by ad impressions, climbing upwards since January 2000 when the group's market share made up just 15 percent. Integrating online advertising in their overall campaigns, top traditional advertisers are embracing the Web as an important channel to get their message across.

Among the top traditional advertisers, AOL Time Warner boosted its online advertising presence by employing 28 percent more unique ads since 2001 with the launch of AOL 8.0. Microsoft increased its use of online advertising by 9 percent with its push of rival product MSN 8. Promoting brands including Volvo, Hertz and Mazda, Ford Motor Company's online ads jumped by 34 percent, primarily in Q4. Disney's promotion of *ESPN The Magazine*, ABC's *Alias* and Disney Cruise lines increased its online presence by 28 percent. Other big growth rates came from DaimlerChrysler, whose online presence skyrocketed by an astonishing 407 percent over 2001.

Traditional advertisers are also more apt to experiment with different ad formats, according to Nielsen//NetRatings AdRelevance. In 2002, the top 100 traditional advertisers relied heavily on non-standard larger ad dimensions, with 92 companies out of the 100 using the full banner format (see chart). Eighty companies employed non-standard, large-size banners in their campaigns, while 87 of the top 100 advertisers used the skyscraper format.

Additionally, advertising technologies such as Flash and rich media have been garnering support over the last few years. Eleven percent of all impressions served by the top 100 traditional advertisers utilized Flash technology. While the 11 percent may seem small, 82 of the top 100 traditional advertisers employed Flash technology in their campaigns. The "floating ad" format, Eyeblaster, was also popular amongst traditional advertisers. Forty advertisers used the technology in the fourth quarter of 2002. For more information, please visit www.nielsen-netratings.com.

New vintage of wine consumers: young and ethnic

Scarborough Research, New York, unveiled the results of its national survey of wine consumers, which indicates that a new vintage of wine purchasers is hailing from a young and ethnic demographic. The Scarborough Wine Market Report reveals that over a third (39 percent) of U.S. adults age 21 and older have purchased wine in the past three months. The report also confirms the hunch that the wine consumer is more affluent (33 percent have a household income of $75K+) and better educated than an average American (39 percent have attended some college). The data also gives a new, wider definition of the wine consumer.

A quarter (25 percent) of wine purchasers are between the ages 21-34 and nearly half (45 percent) are between the ages 35-54. The ethnic make-up of wine drinkers closely mirrors the ethnic make-up of the U.S population with 10 percent of wine consumers being African-American and 10 percent Hispanic.

Younger wine consumers are more apt to pay a higher price for a bottle of wine. Wine consumers age 21-24 are twice as likely than the average purchaser to spend $20 or more on a bottle of wine, and those age 25-34 are 76 percent more likely to pay for high-end wine while adults age 65 or older are 74 percent less likely to pay top dollar for wine. Additionally, champagne purchasers are 29 percent more likely to be between the ages of 21-24.

The report also establishes a correlation between the price point of a bottle of wine and ethnicity. Only 6 percent of drinking-age adults spent more than $20 for a bottle of wine, but Hispanic wine consumers are 96 percent more likely to spend $20 or more on a bottle. Additionally, African-American wine purchasers are 39 percent more likely to reach for the higher-priced wine labels. African-American wine consumers seem to have an affinity for champagne or sparkling wine. This consumer segment is 59 percent more likely to purchase a bottle of champagne or sparking wine than the average wine consumer. Hispanics are also slightly more likely (13 percent) to purchase champagne.

The data for the Scarborough Research Wine Market Report is drawn from Scarborough USA+ 2002 Release 1 (February 2001 – March 2002) with over 200,000 adults interviewed in 75 of the country's largest markets. The wine report details the demographics, beverage consumption, lifestyles, shopping patterns and media usage of wine consumers, including differentiations between price points. For more information visit www.scarborough.com.

Executives will take less time off in 2003

Nearly half of American executives plan to make fewer vacation plans in 2003, many citing the demands of their job, according to a survey by Management Recruiters International (MRI), Cleveland.

Of the 730 executives who responded to the survey, 47 percent said they will not use all the vacation time that they are entitled to this year. Moreover, 58 percent of that group said the demands of their job were the primary reason.

"There's a sense in corporate America that this is the year to knuckle down and stay at your desk," says Allen Salikof, president and CEO of MRI. "Usually, executives prize their vacation time as essential to recharging their batteries. But with the economy continuing to limp along, executives are hoping that a little extra elbow grease will help revitalize corporate health more quickly."

With the air still leaking out of companies' tight budgets, resulting layoffs have put more pressure on smaller staffs, which could be another factor compelling executives to work longer hours and take fewer vacation days.

"A lot of executives feel, 'Well I'm lucky to still HAVE my job so I want to make sure, if there is another round of layoffs, that I'm viewed as indispensable,'" says Salikof. "One way of demonstrating your value as an employee is showing your dedication to your desk. Management notices when a worker shrugs off vacation days."

In addition to economic and employer pressures, another factor weighing on many executives is their shifting attitude toward air travel. In light of world events, Americans are now inclined to cancel long trips, especially overseas, in favor of holiday weekends within driving distance of their homes. Domestic and international threats have, for the time being, removed the excitement of exotic vacations and replaced it with concern for personal safety. For more information visit www.BrilliantPeople.com.

Research Industry News

continued from p. 15

surveys, questionnaires and studies conducted on the Web. Their new approach will solve a fundamental problem in marketing research. By being able to control and measure the validity of the responses, the Megatab-Atredes solution aims to ensure reliability of the results in a controlled environment.

Association/organization news

The Travel and Tourism Research Association (TTRA) has announced its support of the Principles of Marketing Research certificate program, which was developed by the **Marketing Research Association** in conjunction with the University of Georgia Center for Continuing Education. "For several years we have struggled with the best method of offering industry certification to our members, and after careful review by the TTRA board of directors, we have chosen to recommend this excellent program to our members," says John Packer, TTRA president. "We are very excited about the opportunity this gives our members to receive a more intensive, practical marketing research education while working in the field."

ESOMAR (the European Society for Opinion and Marketing Research) has changed its domain name to www.esomar.org. The transition coincides with a restyled Web site design which facilitates access to information and enables easier navigation.

The founder members of **ECOR** (the European Consortium for Online Research) — GfK, Ipsos, MORI, NFO Europe, NOP World, and SPSS MR — have announced the creation of an online research program to quantify the methodological impact of various online sampling options. Working together across multiple countries and using multiple sources of online sample, ECOR members hope to address various methodological issues that have been cited as barriers to the acceptance of online research among European research buyers. By joining forces, the partners hope to stimulate the growth of online research and expedite its adoption in Europe.

The founding consortium members are attempting to establish industry standards to ensure the success of European online market research. By understanding the methodological impact of various online sampling alternatives, guidance can be provided to the industry at large, making it easier for research buyers to have greater confidence as they move a greater portion of traditional research online. For more information visit www.onlineresearch.org.

A first **World Industry Network** (WIN) meeting will be held on May 22-23 in Brussels. Facilitated by ESOMAR/EFAMRO (European Federation of Associations of Market Research Organizations) and the Advertising Research Foundation, this meeting will bring together research associations from around the globe for the first time to assess and collectively take action against the challenges and opportunities that the market research industry is facing.

Key objectives of the summit include setting the agenda and jointly addressing industry issues related to the need for concerted industry effort, quality standards of performance, legislative representation among others.

The WIN meeting will partly build on the outcome and the follow up of the process of RELEAS (Research Leaders Summit). The WIN meetings will alternately consist of a meeting of industry leaders every other year and a meeting of representatives of market research associations. Participation is by personal invitation.

New companies/new divisions/relocations/expansions

Millward Brown has opened an office in Taiwan which will be headed by Deepender Rana, managing director, Millward Brown Hong Kong and Taiwan.

St. Louis-based **Maritz Research** has formed a new group called Product Planning & Development. Wally Balden assumes the group's lead role as director of product planning and development. The new unit will be focused primarily on new product development, product management and portfolio management.

Opinion Research Corporation, Princeton, N.J., has opened an office in Shanghai.

KLD Marketing Research, Inc. has moved to a new location and expanded the services provided. The address is 570 Vale Park Road, Suite B, Valparaiso, Ind., 46385. All phone numbers, fax numbers and e-mail addresses remain the same.

Company earnings reports

Taylor Nelson Sofres plc (TNS) has announced its preliminary results for the year ended December 31, 2002. During 2002, the group's reported revenues including joint ventures increased by 6.2 percent to £618.9 million (2001 £582.7 million). This includes acquisitions made during the year to strengthen the group's position in the U.S. market and media intelligence sector and reinforce its online research capabilities, as well as to extend its operations into Sweden and Greece. Underlying growth, excluding the effect of currency, acquisitions and operations discontinued during the year, was 0.5 percent. Revenues excluding joint ventures was £603.2 million (2001 £575.1 million).

Adjusted earnings per share before goodwill charges were 8.6p, an increase of 7.5 percent (2001 8.0p). Basic earnings per share fell by 23.3 percent to 3.3p (2001 4.3p). The board is recommending a final dividend of 1.7p per share (2001 1.6p), giving an 8.3 percent increase in the total dividend for the year of 2.6p (2001 2.4p).

Seattle-based online satisfaction survey firm **NetReflector, Inc.** announced that it ended 2002 profitably, with total billings up by 75 percent over 2001 and revenues up by 40 percent, beating the 2002 forecast by 111 percent. The company attributes these financial results to the launch of InstantSurvey 4.0 and a change in the company's sales and marketing strategy.

Browns Foundation

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ed with Foundation board members and staff. The survey was housed at www.brownsfoundationtalk.com and remained live for nine days.

Screening questions ensured respondents were not employees of the Cleveland Browns or the Cleveland Browns Foundation. Throughout all phases of research, anonymity was guaranteed, with no responses linked directly to a respondent. This encouraged candid feedback and provided a richer understanding of the perceptions and motivations of all audiences.

Survey respondents were recruited through two methods. First, an e-mail invitation was distributed among all audiences for which the Browns had available e-mail addresses. Second, an oversized postcard invitation to complete the survey was mailed to audiences whose e-mail addresses were not available to the Browns, in order to ensure a valid representation of the target audience and to enhance response rates.

The total number of unique respondents was 213. About one-quarter reported having previously donated to the Cleveland Browns Foundation.

Identical words and images used in the qualitative study with the Foundation's management team and board were applied in the online surveys, allowing researchers to draw comparisons between the two studies. The key difference, though, was that donors and prospects were queried about what images and words represent their "current image" of the Cleveland Browns Foundation, not their "ideal image," as management and board members were asked.

Audience insight — identifying perceptual gaps

Overall, there were few differences between management's and board members' perception of the ideal Foundation and prospective and existing donors' current perceptions. However, not surprisingly, the second study revealed that external audiences have little awareness and knowledge of the relatively new Foundation beyond its charitable mission to help community members in need.

Of all images evaluated across both studies, respondents most frequently associated the Foundation with images of folded hands, mechanical gears, a man leaping over a canyon and a runner stretching.

Respondents associated the folded hands and gears images with "working together with the community." While board members and managers said the images represented the ability for the Foundation and the Browns to work together to improve the community, few external audience members mentioned a relationship between the Browns team and the Cleveland Browns Foundation.

Respondents associated the image of the man leaping the canyon with "bridging the gap" or "helping" others (e.g., kids, underprivileged) to overcome life's obstacles and achieve goals. Board members and managers chose this photo to represent their ideal Foundation, one which would set goals and not be afraid to take risks in growing the Foundation's donor base and providing support in the community.

The image of the runner stretching was most often linked with the Foundation, because of its association with sports and athletics. This is indicative of the influence the Cleveland Browns organization plays in generating perceptions of a Foundation associated with such a high-profile sports team and the ability of the Foundation to capitalize on such an affiliation in soliciting support and donations.

For the word association exercise, more than two-thirds of respondents from the external audience associated "community," "local," "responsible" and "respectful" with the Foundation as a current perception. All of these, with the exception of "local," were associated with the ideal Foundation during branding interviews conducted with managers and board members.

Charitable giving motivations and obstacles

The most frequently reported reason for donating to the Foundation for prospective and existing donors was the affiliation of the Cleveland Browns team and the chance to meet the players. This finding was consistent with perceptions determined during one-on-one brand interviews conducted with staff and board members.

Not surprisingly, altruistic responses were mentioned most frequently for what respondents from the external audience liked best about the Foundation. Specifically, sponsoring events that help underprivileged children received a high percentage of all responses.

By far, the most frequently reported obstacle for not donating to the Browns Foundation was a lack of awareness and knowledge about the organization, justifying the need to "spread the word."

The creative process

Findings from both research phases were used to develop a credible, relevant and unique brand image for the Foundation that provided the groundwork for all communications

The color orange — the color of Browns helmets — was used to connect the spirit of the Browns to the efforts of the Foundation.

efforts. Research revealed that the advertising needed to distinguish the Cleveland Browns Foundation from other local foundations through its tie to the Cleveland Browns and emphasize that it supports programs benefiting underprivileged children in northeast Ohio.

The campaign was designed to give Browns fans and all northeast Ohio residents a better understanding of what the Foundation does and how it benefits the region. The integrated local campaign utilized print, radio, television and billboard ads to show how the Foundation supports educational programs and activities such as dance and art for underprivileged children in northeast Ohio.

But beyond communicating the function of the Foundation, the advertising campaign also had to connect the spirit of the Browns to the spirit of the Foundation, according to Joanne Kim, a partner and creative director at Marcus Thomas. That spirit is expressed in the color orange (the color of Browns helmets), which creates an almost visceral reaction in fans. The tie to youths is made via the image of a young ballerina touching her orange ballet slippers in the print, television and billboard ads; and the sounds of cheering in a radio spot about a young boy's accomplishments. The tagline, "This victory dance brought to you by the Cleveland Browns Foundation," creates a double meaning. To differentiate the Foundation from other local charities with a less specific focus, the ads include a call to action to contact the Foundation to help children accomplish great things.

Campaign evaluation metrics

Elements from the advertising campaign were used throughout 2002 and some pieces may run again in 2003. Marcus Thomas plans to evaluate the success of the campaign based on changes in annual donations secured by the Foundation.

Product & Service Update

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BMRA offers free Researcher's Toolkit

The British Market Research Association is now offering its Researcher's Toolkit CD-ROM. The toolkit is free and provides an array of statistics, information and opinions on a wide range of subjects. The areas covered in the toolkit include: macromarket data; information on the U.K. market research industry (includes BMRA-member company listings and profiles); useful information sources; market research techniques; BMRA members' omnibus surveys; relevant business literature; industry codes of conduct; how to commission research (includes BMRA-member company listing and Selectline); education courses. All BMRA members will receive several copies of the CD and it is also available on the BMRA Web site at www.bmra.org.uk.

Arbitron enhances RADAR

New York-based Arbitron Inc. has made several enhancements to its RADAR network radio ratings service, including increased sample size, improved sample balancing techniques and new software reporting capabilities. RADAR (Radio's All Dimension Audience Research) is a radio ratings service that measures national radio audiences and the audience size of network radio commercials and commercials within programs aired on 37 radio networks.

Beginning with RADAR 76, which was released on March 24, RADAR reports are now based on an annual sample of nearly 50,000 radio diaries. Arbitron began the transition from telephone to diary measurement in June 2002. The last release using all telephone (March 2002) had a sample base of 12,000 respondents.

Arbitron is also introducing techniques that will improve sample balancing for Hispanic respondents and for Black Non-Hispanic, and ensure the proper weighting for a number of demographic and geographic characteristics.

The NRRC (Network Radio Research Council) agreed with the use of the new sample balancing methods, after reviewing a test that showed the new methods produced a balanced diary sample consistent with population projections. The methods use 16 discrete sex/age groups; four census region groups; five county size groups and three household size groups; as well as race and ethnicity. For more information visit www.arbitron.com.

Study documents power of newspaper ads

Results from a conversion study conducted by Millward Brown UK for the U.K.-based Newspaper Society demonstrate that local press advertising plays a vital role in pushing consumers along the buying process towards purchase. The study represents the largest piece of independent advertising effectiveness research ever undertaken by the U.K. regional press. It tracked multimedia advertising campaigns for 26 brands in four regions of the U.K., and involved over 9,000 face-to-face interviews. The study has also been named Advertising Effectiveness Research of the Year by the World Association of Newspapers. View the results of the research at www.planregionalpress.co.uk.

Track Web audience data via daypart

New York-based Nielsen//NetRatings has launched Internet Pocketpiece, a syndicated online measurement product providing audience data and analysis across dayparts. About, Inc. and PRIMEDIA have signed on as charter clients and were instrumental in developing the product. Designed for the media community, the Internet Pocketpiece provides a topline view of the monthly traffic for the top 250 ad-supported Web sites as measured by Nielsen//NetRatings. This removes all non ad-supported sites from the data to specifically target the Web sites important to the competitive analysis regularly conducted by the media community. This tool will be focused on measuring dayparts for Web sites across various metrics including unique visitors, active reach, the percent of time spent, as well as demographic breakdowns. The Nielsen//NetRatings Internet Pocketpiece can be tailored to fit specific needs, allowing clients various customized product options, including: the ability to see daypart data on Web sites outside of the top 250 ad-supported sites; and the option for clients to create custom groupings of their content as well as competitors' content. For more information visit www.nielsen-netratings.com.

Stat package from SPSS

SPSS Inc., Chicago, is now offering SigmaStat 3.0, a statistical software package that enables users to perform statistical analysis and interpretation without being a statistics expert. SigmaStat guides users step-by-step through analysis, from picking the appropriate technique, to checking assumptions in the data, to reporting the results in plain English. Used together, SigmaStat and SigmaPlot offer a toolkit for statistics, curve-fitting and regression and publication-quality graphics and reports.

For current SigmaStat users, the latest release of SigmaStat provides a link to SigmaPlot, which enables: access to SigmaPlot files in SigmaStat; access to SigmaStat files in SigmaPlot (requires latest versions); access to SigmaPlot's graph-editing features, including: SigmaPlot's graph properties dialog, for modifying any object in the graph; new toolbar palettes, which allow users to selectively edit objects such as bars or lines or individual points in a scatterplot, or allow the editing of multiple items simultaneously; and a new text formatting toolbar, which enables on-page text editing.

SigmaStat 3.0 also includes new or upgraded features, such as:

• Survival analysis using Kaplan-Meier (product limit) method to estimate the survival function of subjects followed over time. Survival curve options include error bars, confidence intervals, display censored or failure values, color schemes.

• New report page with improved page and keyboard controls; ability to export reports to .HTML or .PDF formats.

• New data worksheet with more flexibility to work with larger data sets.

• Improvements in graphing data such as new data format options, automatic graph legends and more symbols.

• Windows 2000/XP support and the ability to import MS Access and SPSS files. For more information visit www.sigmastat.com.

Study analyzes effects of pharmacists' OTC recommendations

Markitecture, a Norwalk, Conn., research firm, has launched a syndicated study to analyze the effect of pharmacists' recommendations on OTC sales. The study will include several hundred pharmacists, ranging from small independents to large pharmacy chains across the U.S. Pharmacists will be asked to rate each brand within each product category for attributes and benefits. The study will measure how often pharmacists recommend OTC products and how often those recommendations directly result in sales. Results can be tailored for individual clients subscribing to the syndicated study. For more information contact Robert Shulman at 203-855-9050 or visit www.markitecture.com.

Qualitative television rating debuts

New York-based Scarborough Research and Nielsen Media Research have partnered to offer the NSI Profiler, a new qualitative television rating which combines Nielsen Station Index (NSI) ratings with Scarborough's qualitative consumer indices. This combination of Scarborough's qualitative information with the NSI rating enables users to take lifestyle, shopping preference and other consumer behaviors into account when determining the propensity of a viewer to tune in to certain television programs. The NSI Profiler is available through Scarborough's PRIME NExT data analysis software to all clients who subscribe to both Scarborough Research and Nielsen's local ratings service. For more information visit www.nielsenmedia.com or www.scarborough.com.

Update of Databeacon Collaboration Edition

Databeacon has released a new version of its Web reporting and data analysis software. Databeacon Collaboration Edition offers anyone with a browser and a connection to the Internet the ability to collaborate on Web reports without the need to install software or take training. Sending an e-mail from the Databeacon Insight viewer to people of your choice activates a self-defined workgroup. E-mail recipients click on an "Analyze Report" link and they can continue to interactively analyze Web report data within their own automatically loaded, free Databeacon Insight viewer, adding their own Web reports to share within the workgroup as needed.

The initial release of Databeacon Collaboration Edition is an English-only release, and will run on Microsoft operating systems, standard Web servers, and IE 5.0+ and Navigator 4.7+ browsers. Releases offering UNIX and Microsoft Analysis Services support, as well as multilingual support, will follow this summer. For more information visit www.databeacon.com.

Briefly...

A new research firm, Research Resolutions, has opened in the Dallas-Ft. Worth area, with a satellite office in Tampa, Fla. The firm specializes in **Internet surveys and IVR** and has an **online research panel** of up to four million, with one million fully profiled, available. For more information contact Debbie Peternana at 972-422-2260 or at debbiep@researchresolutions.com.

The Caney Group, a Monroe, Conn., research firm, has developed Word for Word, a new service that utilizes **observational research of consumers** as they choose and use products to uncover their spoken and unspoken needs and desires. Word for Word also lets marketers incorporate video clips into their PowerPoint presentations. For more information visit www.caneygroup.com/word.html.

Focus Pointe has opened a **facility in Santa Monica, Calif.**, approximately 15 minutes from the Los Angeles airport. For more information contact Bridgid Delgardio at 310-260-8889 or at bdelgardio@focuspointe.net.

Moderator MarketPlace™

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

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2003 Telephone Facilities Directory

The 2003 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.

A searchable version of this directory is available on our Web site at www.quirks.com.

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

1. STATIONS - No. of interviewing stations at this location
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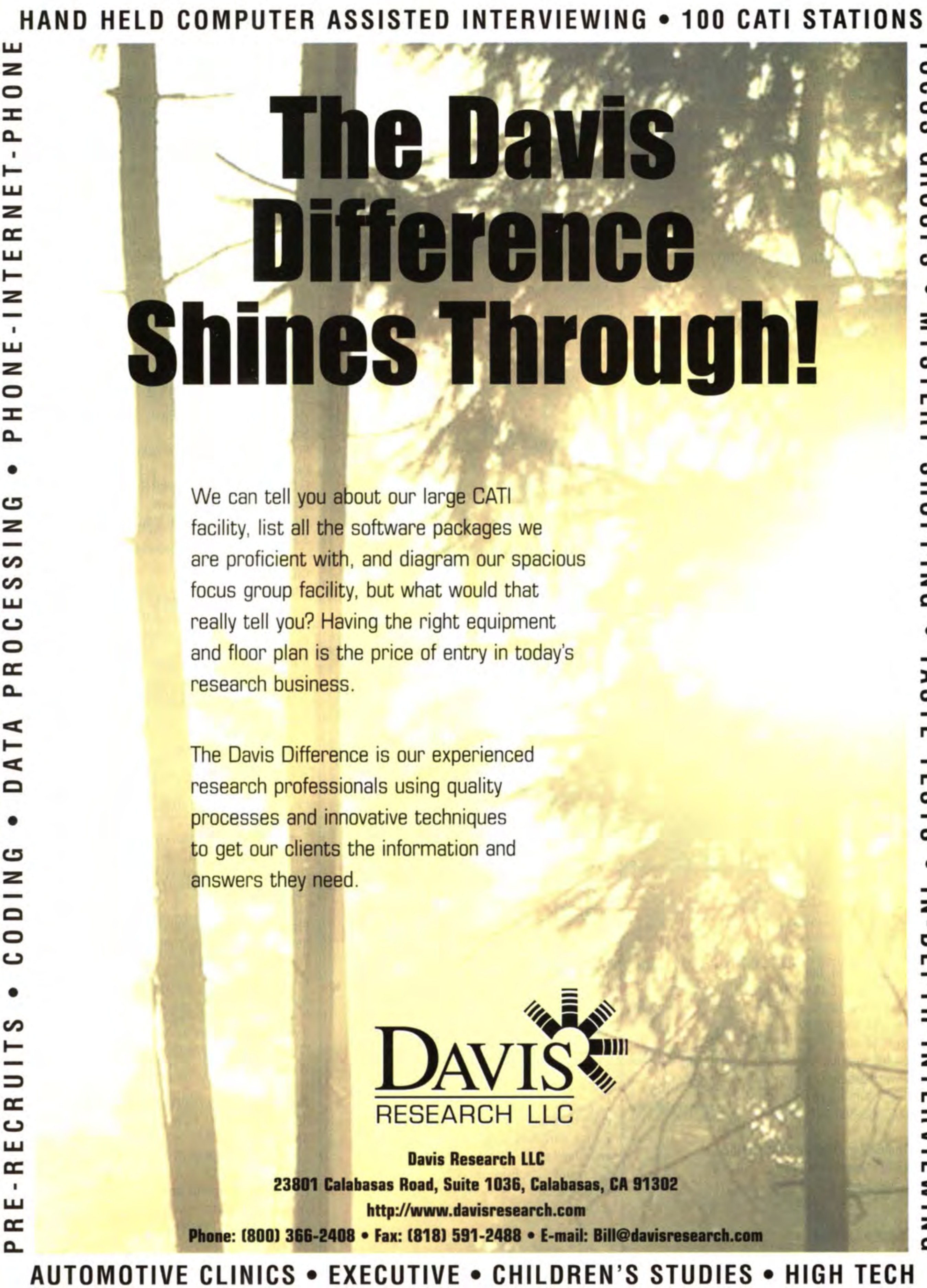
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Fax 314-863-6708
E-mail: inquiry@theplanningcenter.net
www.theplanningcenter.net
20-20-20-0

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
12-0-12-0

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: jvice@serviceresearch.com
www.serviceresearch.com
Mike Briiten, President
22-0-22-22

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
54-40-54-54

Omaha

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

Wiese Research Associates, Inc.
9375 Burt St., Suite 100
Omaha, NE 68114
Ph. 402-391-7734
Fax 402-391-0331
E-mail: mary_arkfeld@wraresearch.com
Tom Wiese, President
18-18-18-18

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
45-45-45-45

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: lynn.stalone@ihr-research.com
www.ihr-research.com
Lynn Stalone, Partner
150-150-150-150
(See advertisement on p. 102)

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
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Eric Souza, President
19-0-19-0

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Glynis Giangrande, Dir. of Client Services
250-250-250-250

MRCPhone has a rich history of delivering data on-time, according to requirements and within budget. Our hi-tech capabilities allow real-time delivery of frequency, percentages, production reports and data. MRCGroup's business-to-business interviewers are some of the best in the industry. Features include: 250 CATI stations, predictive dialers, speed dialers, sample management, 10:1 supervisory/interviewer, audio/visual interviewer monitoring, remote monitoring, secure client Internet download sites, real-time frequencies, percentages, consumer interviewing, and Internet streaming media client briefings.
(See advertisement on p. 103)

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
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Fax 908-281-5103
E-mail: orcinfo@prn.opinionresearch.com
www.opinionresearch.com
Warren Frankel
79-79-79-79

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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

Atlantic City/ Northeast Shore

Centrac, Inc.
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Ph. 732-920-0500
Fax 732-920-3896
E-mail: RLeeds@centrac.com
www.centrac.com
Ron Leeds, President
100-100-100-100

Schulman, Ronca & Bucuvalas, Inc.
185 Monmouth Pkwy., Suite B4
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 or 800-336-0159
Fax 201-909-9877
E-mail: newyork@consumerpulse.com
www.consumerpulse.com
Liz Ellingsen, Manager
8-8-8-8

Focus World International

Focus World International, Inc.
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Holmdel, NJ 07733
Ph. 732-946-0100
Fax 732-946-0107
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www.focusworldinternational.com
Gary Eichenholtz, CEO/CFO
60-24-60-60

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Fax 201-356-1910
www.imresearch.com
40-20-40-40

Marketing Solutions Corporation
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Cedar Knolls, NJ 07927
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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: laurelm@whoisq.com
www.whoisq.com/whoisq.htm
Brendan Sammon, Sr. Account Executive
75-75-75-75
(See advertisement on p. 104)

10:00 am	SSI receives panicked call to start telephone project tonight.
10:15 am	Questionnaire sent to SSI's team of CfMC Programmers and Project Manager for initial review.
10:45 am	SSI's Project Manager and Programmer review project with client.
11:00 am	Project Manager coordinates staffing with SSI's Telephone Center Manager.
11:15 am	Project Manager reviews monitoring expectations with QA Manager.
1:30 pm	Questionnaire programmed and client is alerted they are able to check the questionnaire on SSI's system.
2:00 pm	Random data file produced and output is checked for skip patterns and data integrity.
2:30 pm	Project Manager conducts final on-screen review.
3:00 pm	Client calls with final approval. Sample loaded and quotas set.
3:30 pm	Briefing conducted by Project Manager.
5:00 pm	Interviewers begin calling on project.
9:00 pm	East coast quota completed.
12:00 am	West coast quota completed.
1:00 am	Top line data delivered.
1:01 am	Client exhales.

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www.schlesingerassociates.com
Steven Schlesinger, President
65-0-65-65
(See advertisement on p. 9)

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
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Fax 201-986-0119
E-mail: mayur@technometrica.com
www.technometrica.com
Raghavan Mayur, President
30-30-30-30

TMR, Inc.
Two Sylvan Way
Parsippany, NJ 07054
Ph. 973-829-1030
Fax 973-829-1031
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www.tmrinfo.com
Jamie Jurgaitis, V.P./G.M.
50-50-50-50

The Wats Room, Inc.
18 Railroad Ave.
Rochelle Park, NJ 07662
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Fax 201-845-3131
E-mail: jenpaulson@twri.com
www.thewatsroom.com
Arlene Harris, Sr. Vice President
180-180-180-180

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Bob Magee, A.V.P. Operations
350-350-350-350

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Ph. 609-882-9888
Fax 609-882-9826
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www.olsonresearchgroup.com
Chip Olson, President
25-25-25-25

New Mexico

Albuquerque

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Albuquerque, NM 87110
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Fax 505-883-4776
E-mail: laurie@nmia.com
www.sandiamarketresearch.com
Laurie Meyerer, General Manager
14-14-14-14

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Southwest Planning & Marketing
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Santa Fe, NM 87501
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Fax 505-984-1393
E-mail: swpm@prodigy.net
www.swplanning-marketing.com
Bruce Poster, President
5-0-5-0

New York

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

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

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
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Amherst, NY 14228
Ph. 716-689-3311
Fax 716-689-3342
E-mail: goldhaberdp@earthlink.net
www.goldhaber.com
Paulette A. Faraci, Dir. Client Services
17-17-17-17

ICT Research Services/VFIS
3370 Walden Ave., Suite 100
Depew, NY 14043
Ph. 716-651-6004
Fax 716-651-0473
E-mail: jprice@ictgroup.com
www.ictgroup.com
Judy Price, Vice President
120-120-120-120
(See advertisement on p. 116)

Marketing Decisions Group, Inc.
9141 Main St.
Buffalo, NY 14031
Ph. 716-634-2045
Fax 716-634-9560
E-mail: mdgarup@aol.com
Arup Sen, President
15-15-15-15

Survey Service, Inc.
1911 Sheridan Dr.
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. 105)

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New York City

(See also Northern New Jersey)

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6400 Jericho Tpke.
Syosset, NY 11791
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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
Ph. 212-260-0070
Fax 212-979-5647
E-mail: CMcma9@aol.com
Carol McMahon, Partner
90-50-90-90
(See advertisement on p. 109)

Diversified Research, Inc.
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Irvington, NY 10533
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Fax 914-591-4013
Michael La Velle, President
25-25-25-25

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2100 Bartow Ave., Suite 243
Bronx, NY 10475
Ph. 718-320-3220
Fax 718-320-3996
E-mail: emr@interport.net
www.ebonymktg.com
Bruce Kirkland, Vice President
90-0-90-0

Informed Marketing Sources, Inc.
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Troy, NY 12180
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Fax 845-331-2012
E-mail: info@informed-sources.com
Bob Kasper, Vice President
40-40-40-40

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Ph. 212-213-3303
Fax 212-213-3554
E-mail: rbrooks@ipcgroup.us
Rhoda Brooks, Partner
60-60-60-60
(See advertisement on p. 108)

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Howard Gershowitz, Exec. Vice President
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Joe Rafael, Chairman
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(See advertisement on Inside Front Cover)

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Andrea Waller, President
25-0-25-25

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Ph. 212-979-5647
E-mail: spnscch@aol.com
Carmen Rivera
90-90-90-90
(See advertisement on p. 110)

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

TIS-Friedman
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400-400-400-400

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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.
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122-122-122-122
(See advertisement Inside Back Cover)

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Fax 585-784-2154
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Joe Snyder, Dir. of Data Operations
100-100-100-100

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163-163-163-0

North Carolina

Charlotte

Consumer Pulse of Charlotte
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Charlotte, NC 28212
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Fax 704-536-2238
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Daniel Bashaw, Director
10-8-10-10

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600 S. Tryon St.
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Ph. 704-358-5757 or 800-852-2794
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www.kpcresearch.com
Jack Clark, Research Director
36-36-36-36

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Charlotte, NC 28273-3335
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Fax 704-357-1965
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Teri Leibowitz, President
15-10-0-0

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Fax 704-332-0499
E-mail: mparker@marketwise-usa.com
www.marketwise-usa.com
Mimi Parker
22-22-22-22

Greensboro/ Winston-Salem

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Winston-Salem, NC 27106
Ph. 336-896-2200 ext. 1009
Fax 336-896-2201
E-mail: allpoints@allpointsresearch.com
www.allpointsresearch.com
Sherrie Aycock, Co-Owner
38-38-38-8

Bellomy Research, Inc.
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Winston-Salem, NC 27104
Ph. 800-443-7344
Fax 336-721-1597
E-mail: johnsessions@bellomyresearch.com
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John Sessions or Carol Hefner
150-150-150-150

CB&A Research, Inc.
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Carol Hefner
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www.telectr.com
Liz Winter, Owner
132-132-132-132

Raleigh/Durham

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Chapel Hill, NC 27516
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Greg Huling, Operations Manager
100-0-100-100

Johnston, Zabor, McManus, Inc.
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2222 E. Chapel Hill/Nelson Hwy. (Hwy. 54)
Beta Bldg., Suite 300
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Ph. 800-735-5448 or 919-544-5448
Fax 919-544-0954
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George Matijow, President
10-10-10-0

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805 Sunflower Ave.
Cooperstown, ND 58425
Ph. 800-533-5761
Fax 800-339-1043
E-mail: terik@dynamicsmarketinginc.com
www.dynamicsmarketinginc.com
Teri Knutson, Research Director
85-85-85-85

Teleforce, Inc.
601 28th St. S.W.
Fargo, ND 58103
Ph. 800-323-0810
Fax 701-232-3773
E-mail: teleforce@aol.com
Shannon Dneault
120-10-120-120

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

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

Jamestown

Dynamics Marketing - Jamestown
1805 13th St. N.E.
Jamestown, ND 58401
Ph. 701-251-9120 or 800-533-5761
E-mail: terik@dynamicsmarketinginc.com
www.dynamicsmarketinginc.com
Teri Knutson, Research Director
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Ohio

Cincinnati

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Jim Moler
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E-mail: info@burke.com
www.burke.com
Steve Clark, V.P. Data Collection
200-200-200-200

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Cincinnati, OH 45242
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Patricia A. Calo, Vice President
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Duane Clement, CEO
120-120-120-120
(See advertisement on p. 41)

Consumer Pulse of Cincinnati
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9663A Colerain Ave.
Cincinnati, OH 45251
Ph. 513-385-8228 or 800-336-0159
Fax 513-385-2140
E-mail: cincinnati@consumerpulse.com
www.consumerpulse.com
Phil Blantley, Director
6-4-6-6

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Kathy Renaker, Account Executive
85-85-85-85

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E-mail: ken@fieldsresearch.com
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Bernie Kearney, Vice President
27-27-27-27

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50-0-50-0

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56-56-56-56

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Randal Thaman
96-96-88-88
(See advertisement on p. 112)

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24-0-22-0

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www.rdimarketing.com
Josh Hiley, Account Services
60-60-60-60

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Highland Heights, KY 41076-1750
Ph. 859-781-9700
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www.sirsinc.com
Bill Welch
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Barbara Smith, Field Service Director
25-25-25-25

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Amy Morris, Executive Director
12-3-10-0
(See advertisement on p. 113)

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Lauren Wagner, Mgr. Customer Relations
20-20-20-20

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Judy Hominy
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Judy Frederick, Project Director
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Fax 614-261-0076
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Deborah K. Wolfe, V.P. Corp. & Field Ops.
27-25-27-27

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Richard Stock, Director
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Stephanie Schwaegerle
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Fax 419-867-4470
Joyce Clevenger, Exec. V.P.
55-55-55-55

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Mark Iott, Principal
20-20-20-20

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Patty Casteel, President
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Deanna Carter, Vice President
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Tulsa, OK 74145
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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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www.on-linecom.com
Peggy O'Connor
180-180-180-180
(See advertisement on p. 115)

Oregon

Portland

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Gary Frazier, Field Director
30-30-30-30

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www.cosvc.com
Jim Weaver, Manager
12-0-12-0
(See advertisement on p. 129)

Consumer Pulse of Portland
Clackamas Town Center, #2121
12000 S.E. 82nd Ave.
Portland, OR 97266
Ph. 503-654-1390 or 800-336-0159
Fax 503-654-1436
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Vikki Peterson, Director
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Nandita Stixrud, Project Coord. Mgr.
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Steve Boespflug, V.P./Principal
62-62-62-62

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Lester Harman, Field Svcs Acct. Exec.
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John Stepleton, President
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www.sorensen-associates.com
Linda Zinck, Dir., Consumer Research
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Allentown/Bethlehem

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Greg Surovcik, Vice President
25-25-25-25

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www.moore-research.com
Colleen Moore Mezler, President
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Allan Geller, President
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Plymouth Meeting, PA 19462
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Fax 610-825-6805
E-mail: philadelphia@consumerpulse.com
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Eleanor Yates, Director
10-8-10-10

M Davis & Co., Inc.
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Philadelphia, PA 19102-4403
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Guy Dunn
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Hatboro, PA 19040
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E-mail: DMRSUPPORT@aol.com
Linda Celec, President
32-32-32-32

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Steve McFadden, President
300-300-300-300
(See advertisement on p. 21)

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Fax 267-685-5724
E-mail: asuperfine@ictgroup.com
www.ictgroup.com
Alan Superfine, V.P./G.M.
120-120-120-120
(See advertisement on p. 116)

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Fax 610-459-7898
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Gene S. Rullo, President
40-25-40-40

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Fax 215-561-7403
E-mail: psmith@mlr.net
Patricia Smith, Vice President
50-50-50-50

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Chris Ricci, President
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Michael Feldman, Co-CEO
60-60-60-60
(See advertisement on p. 121)

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15-0-15-15
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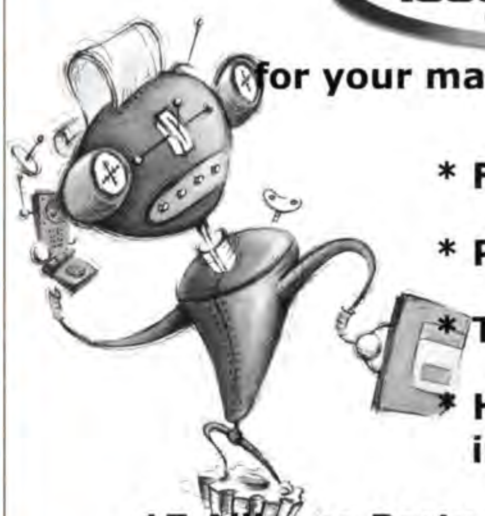

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Fax 804-819-1242
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Peter McGuinness, President
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Ph. 206-241-6050
Fax 206-241-5213
E-mail: info@cosvc.com
www.cosvc.com
Jerry Carter, Vice President
17-0-17-0
(See advertisement on p. 129)

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3. ON-SITE - No. of stations which can be monitored on-site
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Cathy Peda, Vice President
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Fax 425-828-6778
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Richard Secker, Director of Field Service
34-28-24-24

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Jackie Weise, Exec. Vice President
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Mark Rosenkranz, Managing Director
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Steven Dean, Director
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Sharon Abrams
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Jim DeZeeuw, Vice President
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Kathy Fischer
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Scott Segrin, Vice President
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Connie Ruben, President
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(See advertisement on p. 133)

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want to be like us; we want to be like them." That's not what it is about. It's about being proud of who we are and demonstrating the value of marketing research in new ways. I don't go to a huge number of industry events but I hear a lot about doom and gloom and "Is this the end of market research?" and I say, why? Why, when the whole world is showing more interest in information and understanding consumers, why would this be a time for marketing research to be in any way worried? I think it's because it is changing. What we used to be maybe doesn't fit what we should be. The skills and information we have are more relevant now than ever before.

What can client-side researchers do to raise the profile of research?

I think where researchers need to establish themselves is in being willing to bring together a sort of dashboard of information, though some of those bits won't necessarily come from marketing research. Again, it is going beyond that conventional box. Instead of doing just one survey, a survey should be part of a whole stream of information from different sources, a CRM database, from a consultant, maybe it's demographics. And I think once that is all pulled together, the sum of the parts is obviously far greater than the individual parts.

That said, I think that would be very difficult in some companies because the structure that's there tends to put them in a box in the same way as marketing research companies are put into a box. I hope we have the opportunity to at least stretch the box if not break out of it. It's a challenge, but it's an important one.

I think marketing research companies have a role in helping clients, in being proactive in suggesting, "Let's collect this kind of information in this kind of way and analyze it in this kind of way." By doing that and by learning what's helping in other industries or with other clients, [research companies] can pull those best practices together and help increase the profile of research for us and for the research buyer.

Will online research save the industry from declining response rates, etc.? People seem, at the moment anyway, to be more receptive to participating in research online.

It gives it new avenues. At the end of the day it is another form of data collection and data delivery and with it come problems.

Who's to say that that level of interest will maintain? I don't see it as the solution to respondent cooperation problems, that's for sure. I think it has great strength…it is a medium which was not available before and it allows us to do things we couldn't do before — we can send videos into people's homes to test ads, for example; we can send simulated car designs into people's homes to get their feedback — that was pretty inconceivable previously.

I don't think telephone research will die; I think it will find its place. Once again it comes back to not just thinking in terms of replacing what we did with our clipboards and simply putting it online. It's saying, "This technology provides us all kinds of opportunities to do something different, to interact with respondents."

Do you see any other methodologies playing key roles in future?

Another technology we use is interactive voice response. You can ring up an 800 number, you can do it at your convenience, which is great, but at the back of my mind, that's still the researcher with a clipboard, just translated into something different. But we can do more than that with the technology. We can get a consumer into a call center, for example, but divert them into a survey so that immediately after they are through talking to a customer service representative, they can be routed to a survey to provide instant feedback on their experience.

When you think of customer satisfaction, you can ask someone to think back to the last time they went to their bank and what they thought, for example, but they still have to think back. With this approach, you can get immediate feedback from people.

That raises the question: Is that market research or is it quality control? I'm not sure, and I don't really care, because to me it is using our skills and our abilities in a way that is beneficial to clients. And very often it will lead back to other things, to traditional market research. You uncover a pattern of response from customers and you have to find out why. It's mystery shopping, it's qualitative research, it's tracking.

What do you think is behind the move toward conglomeration in the research industry?

Clients need global service and to provide that you have to put together a global network, and that almost invariably would require some level of acquisition. When you have a global network, you need to leverage it by running a product or solution that you have acquired across those geographies.

It actually is quite difficult for independents to compete in some sectors, though there are some sectors where they can do quite well and be quite profitable; qualitative would be an obvious example. A lot of the niche players and the national players are very large and do very well.

For independent firms, is it a matter of "be acquired or go out of business"?

I think independents have to take a view of, when are they going to maximize the value that they have created in their company? Now in part, obviously the prices being paid now are lower than they were two years ago. I don't think they need to go out of business but you have to pick that time where you are a really valuable commodity and a lot of people need you. If you prefer to remain an independent you can still earn a very good living and have a good stream of clients. But there are a lot of people in these companies who want to cash in, not in the sense of getting out of the business, but in getting a return on their investment and that is a question of timing. So I don't think it's "sell or go out of business," it's "sell or perhaps not get as much as you might have done."

Does it make sense for client companies to use a global provider as they go more and more global with their marketing?

Clients fall into different categories. Some are highly centralized — the global decisions are made in one or two locations. For those companies, they probably want to deal with a supplier who could mirror that. It is possible to deal with someone who doesn't have a global network but I think there is a level of reassurance in working with a group.

There are other clients who have a decentralized approach but they still might have preferred or recommended suppliers so although it's not strictly leveraging the global power of a research group, it's that sort of reassurance again that they'll be able to do the same kind of job.

The ideal is, a client wants to work with a boutique where he knows everybody and he has a very strong personal relationship and that boutique somehow magically has global capabilities. In a sense that is what we are trying to create, that level of service and that level of intimacy, not just with client relations but for staff.

My new buzzline is that Synovate is the biggest small company in the world. How achievable it is remains to be seen. But I do believe it is a desire on behalf of staff and clients to have that mix of personalized smallness as well as scale and consistency.

Where do you see the industry heading?

I think there is substantial growth in the industry of market research. But that growth won't all go to traditional market research companies. There will be other data collectors, providers and so on.

If companies are willing to expand into new areas, new technologies, then I think the picture is extremely bright. It is a changing definition. Years ago we used to talk about media buying companies, for example, and what that meant was that you went out and bought media. It's much more than that now. They are doing the planning, the strategy. All of these industries have reinvented themselves by taking into account ancillary services. Marketing research must do the same.

But it seems as though client companies have cut back on research in these tough times, reducing the size of their in-house departments as well as reducing their budgets for conducting research...

That's another fault of our industry. We shouldn't allow that to happen. If you are trying to save money, cutting the research budget is not going to make a big difference, not in the same way as cutting new product development, advertising or media. And, isn't it when things are getting tough that you need the information to know how to handle the downturn? I don't think there is a good reason to cut research expenditures. But that is for us to sell more emphatically. Or maybe it's for us to go out and do the research, to prove the value of the information, and sell it after the fact. It's the confidence in what we do that is sometimes lacking.

Researchers have an almost apologetic approach. A typical marketing research report starts with several reasons why the reader should be cautious about the results: it's only this-size sample; we only looked at this; it's not representative.

That's not the way we should go about introducing things. We should be saying, "Wow, we've got some great information here." Put the cautions in bold and put them in the appendix; they are not your opening statement. "I'm going to tell you some news here but actually you probably shouldn't believe it." That's a pretty stupid way to sell a product.

I hope we are trying to instill a bit of a change of attitude with Synovate. We're new, we have a clean identity. We can basically say, this is what we are and this is what we are going to do. Yes we have all the heritage of all those companies but this is Synovate, and no one knows what Synovate is so let's try and be fresh and aggressive and different.

Classified Ads

Trade Talk

By Joseph Rydholm, *Quirk's* editor

A timely pep talk

When things are getting you down, it's always nice to be cheered up. In New York last month at the annual Advertising Research Foundation (ARF) convention, a lot of the chatter was of the gloomy variety. Show floor traffic was down; fewer firms seemed to be exhibiting; clients were in a holding pattern on spending. So went the litany of woe.

The dour vibe is understandable, especially against a backdrop of war and recession. Granted, it doesn't help that researchers can be almost Russian in their dark-humored pessimism. But I'm convinced all is not lost.

Against this less-than-sunny backdrop, I sat down for a chat with Adrian Chedore, CEO of Synovate. Synovate is the new name for the companies that make up the Aegis Group plc's research network, which was rebranded and introduced in January. The network spans 46 countries and includes firms such as Market Facts, BAIGlobal, Asia Market Intelligence and MEMRB, all of which are now known as Synovate.

Rather than bemoaning the current state of things, Chedore spoke with infectious enthusiasm, brushing away the clouds of doubt and instead focusing on ways to revitalize the industry and improve its near-term and long-term prospects.

What are some ways that researchers can raise the profile of marketing research? Is demonstrating ROI the key?

Adrian Chedore: To the extent that ROI is achieved, that is clearly a way of upping the profile in the boardroom because you get their attention. That is something of a holy grail in a lot of types of research.

I think in terms of improving the impression of the industry, we need to be a bit braver. I think the image of marketing research is still of people going around with clipboards doing surveys and that we are a bit of a sort of cottage industry. That's no one's fault but ours. We have been very, very conservative. We have shied away from [being associated with] anything like telemarketing or CRM. Now, I'm not suggesting in any way that we want to be involved in those processes but this is an evolution and those things are happening and we should be taking our part in those industries, developing them, monitoring them, providing information, rather than seeing them as a threat, as many people do. Clients may say, "Why do we need research? We have this huge CRM database." But I think it's the exact opposite. If a company is getting into CRM that means they are thinking more about their customers and gathering information on them and using it, and that is marketing research's biggest strength. And I think we as an industry should be much more aggressive in broadening the scope of how research is used and viewed. At the end of the day the vast majority of marketing research is still about doing surveys and focus groups but I think we can leverage our skills of analysis and interpretation to be used in slightly less conventional areas which may follow the emerging industries.

I think that technology and the demands of marketers provide huge opportunities for marketing research to get involved and I think that would get us up the food chain. I don't think the consultancy route is the only route. To me they are not a threat to marketing research. I think they are an asset because they encourage the use of research. So I don't see them as competitors though certainly they get to the boardroom more than we do.

For us trying to say that we want to compete with them, that isn't using our innate strengths. It's just saying, "We don't

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