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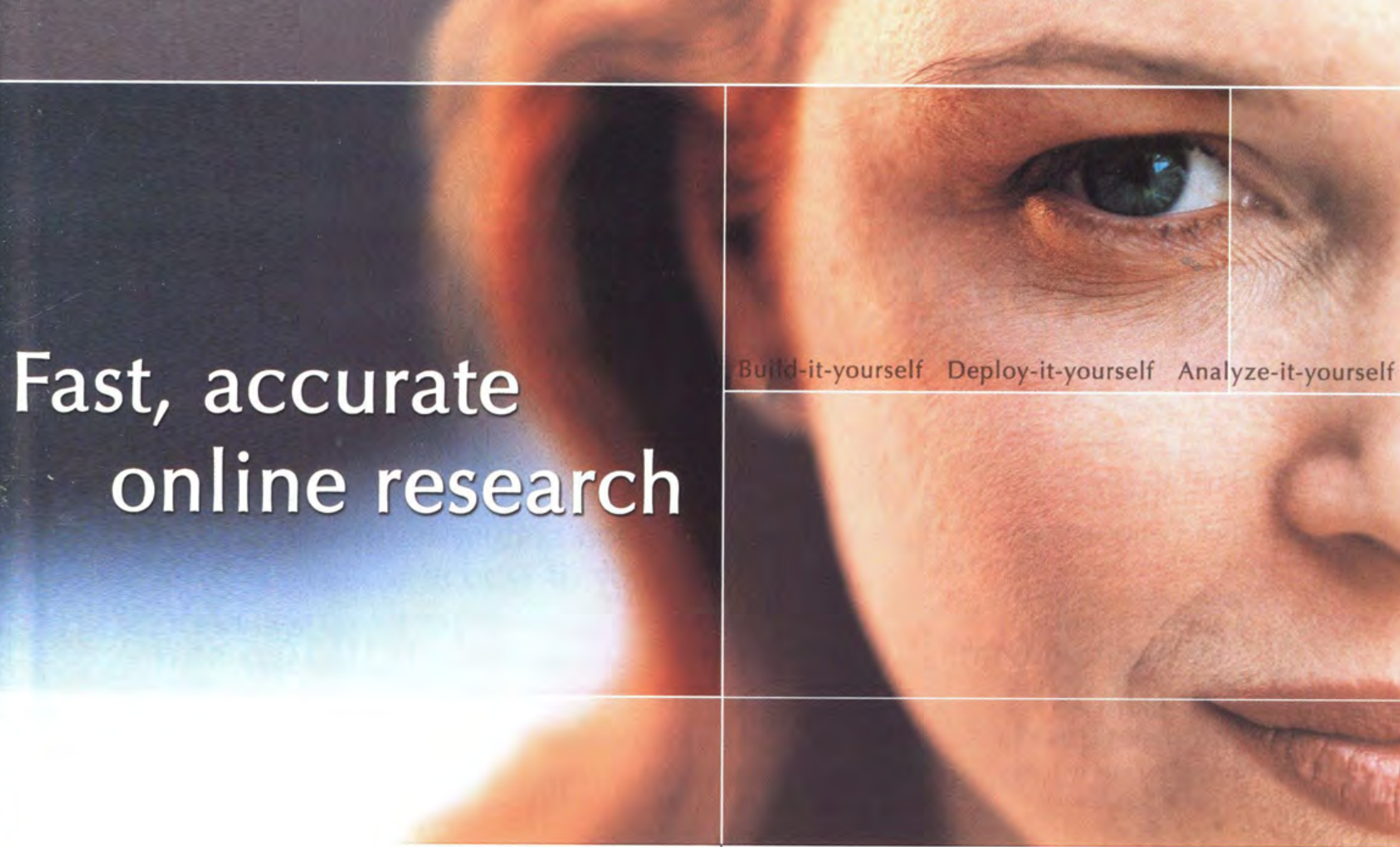

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Illustration by Jennifer Coppersmith

Publisher Emeritus
Tom Quirk

Associate Publisher
Evan Tweed

Editor
Joseph Rydholm

Production Manager
James Quirk

Directory Manager
Steve Quirk

Directory Assistant
Shawn Hardie

Marketing Manager
Dan Quirk

Advertising Sales
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Married women say they find clothes shopping frustrating

Married women between the ages of 35 and 44 are much less satisfied with the clothing options available to them than their single counterparts - particularly when it comes to price. That finding is one part of the monthly Consumer Intentions and Actions (CIA) Study from BIGresearch, Columbus, Ohio. The CIA features information on consumer perceptions, how consumers are spending money in the present and how they intend to do so in the next three to six months.

The February 2004 installment polled 8,000 consumers. Members of the panel were asked to assign a rating of one to five (one being "very satisfied" and five being "very dissatisfied") to statements that assessed their attitude toward clothing purchases. The statements included: "I can find my size," "I can find clothes that fit within my budget," "I can find a style for me" and "I can find a style that is fashionable today."

While 53 percent of single women between the ages of 35 and 44 were satisfied that they could find clothing that fit their budgets, just 38 percent of married women in that age group said they were satisfied. "Clearly, the 35-to-44-year-old married woman is living a different lifestyle than her single counterpart," says retail industry analyst Robin Lewis, publisher of Robin Reports. "Married women tend to have less time for shopping, less disposable income that can be spent on clothing and a tendency to pay less attention to weight gain and exercise."

Forty-six percent of single women in that age group felt satisfied they could find the size they wanted, while 40 percent of married women said the same. In terms of style, however, 55 percent of single women were satisfied they could find clothing that fits their personal look, while only 38 percent of married women agreed. The same held true for finding a style that's in fashion today, with 59 percent of single women satisfied that they could vs. 42 percent of married women. "Married women want the same great styles, but perhaps with a more relaxed fit to better suit their multi-faceted lifestyle," says Lewis. "They work in the office, they raise the kids, they relax. Chico's is an example of a store that has done a great job in this area, and one of the few focusing on this fashion-conscious but comfort-seeking consumer." For more information visit www.bigresearch.com.

Pre-teens prefer gift certificates from toy and book stores

Given a choice of gift certificates from various types of stores, 6-11-year-olds are most likely to prefer one from a toy (29 percent) or book store (24 percent), according to a recent study by Opinion Research Corporation, Princeton, N.J. In the national study of 502 6-11-year-olds, 17 percent preferred a gift certificate from a hobby or sports store, followed by clothing stores (13 percent), music stores (7 percent), restaurants (6 percent), or stores with jewelry and accessories, like hair clips or scrunchies (3 percent).

Among the study's other findings, nearly half of 6-8-year-old boys prefer a gift certificate from a toy store, while boys 9-11 equally prefer a gift certificate from a hobby/sports store or toy store. Book stores and toy stores are about equally-chosen among 6-8-year-old-girls, while most girls 9-11 prefer a gift certificate from either a book store or clothing store. The study was conducted by Opinion Research Corporation's CARAVAN among a nationally representative sample of 502 6-11-year-olds October 23-26, 2003. The study has a margin of error of +/-4 percent at the 95 percent confidence level. For more information visit www.opinionresearch.com.

No time to cook

About 44 percent of weekday meals in the U.S. are prepared in 30 minutes or less, and most consumers would like to cut that time even further, according to The U.S. Market for Ready Meals and Side Dishes, a new report by market research publisher Packaged Facts.

With the number of two-working-parent households, single-parent households, and Generation X and Y consumers who don't know how to cook steadily increasing, it's no wonder that quickly prepared, easily consumed, portable meal solutions are in demand.

The overall market for ready meals and side dishes grew by 39 percent in

continued on page 76

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names of note

Seattle-based *Global Market Insite* has named **Steven Werner** head of its new Chicago office.

Michael Duffey has been named chief financial officer of Chicago-based *Information Resources, Inc.*

Frank Tomecek has been promoted to senior research information technology specialist at *Marcus Thomas*, a Cleveland communications firm.

Tomecek Zimmerman

East Hanover, N.J.-based *NOP World Health* has named **Keith Loehlein**, **Maureen McLaughlin** and **Sue Ramspacher** to head its three new practice areas: Assessment and Tracking (Loehlein), Promotional Effectiveness (McLaughlin) and Consumer as Patient (Ramspacher). Separately, **Barry Zimmerman** has been named CEO of NOP World Health. He will lead the integration of NOP World's three health-focused companies - Market Measures/ Cozint, Strategic Marketing Corporation and NOP Healthcare - into a single global organization.

Mark Steinhaus and **Ken Basil** have joined Winston-Salem, N.C.-based *AllPoints Research* as moderators.

Gregory T. Novak has been promoted to president and chief operating officer of *Harris Interactive*, Rochester, N.Y. In addition, **Albert Angrisani** has resigned as president, COO, and as a member of the board of directors. He will provide advisory services to the company for the rest of the calendar year.

Shannon Ely has joined Rockville, Md., research firm *Centrac DC* as project director.

Suzanne López has been named director of business development at *Bilingual Research Services*, El Paso, Texas.

Simmons Market Research Bureau, New York, has named **Guadalupe Sierra** as brand manager of its Hispanic Consumer Study.

Wendy Marsland has joined U.K.-based *Pulse Train* as senior sales and account manager.

Bruce Mueller has joined *Marketing Systems Group* as senior vice president and director of the new ARCS Division.

Larry Fisher has been named senior vice president of interactive solutions at *Synovate*, an Arlington Heights, Ill.-based research firm.

Love & Co., a Frederick, Md., advertising, marketing and research firm, has named **Karen Lewis** director of research and marketing.

Nutley, N.J., pharmaceutical firm *Roche* has named **Barbara Senich** vice president, sales and marketing services. Marketing research will be among her new responsibilities.

McLean, Va.-based *SnowSports Industries America* has named **Christine Martinez** market research manager.

William R. Derrick has joined Seattle-based *NetReflector, Inc.* as chief technology officer.

New York brand consultancy *Interbrand* has named **Jeffrey M. Horn** principal, brand alignment.

Arbitron Inc., New York, has promoted **Jim Tobolski** to vice president of sales for advertiser agency services.

Patricio Hernandez has been named head of the new Coral Gables, Fla., office of San Diego research firm *Castillo & Associates*.

Walker Information, Indianapolis, has promoted the following associates in the client services and technology departments: **Katie Kiernan** to client service director 2, **Laura Hreno** to project director 2, and **Hope Doyle** to database analyst 2. In addition, **Lu Ann Mattingly** has joined Walker as an accounting specialist.

Marketing Research Services Inc., Cincinnati, has named **Donna Tabb** project director.

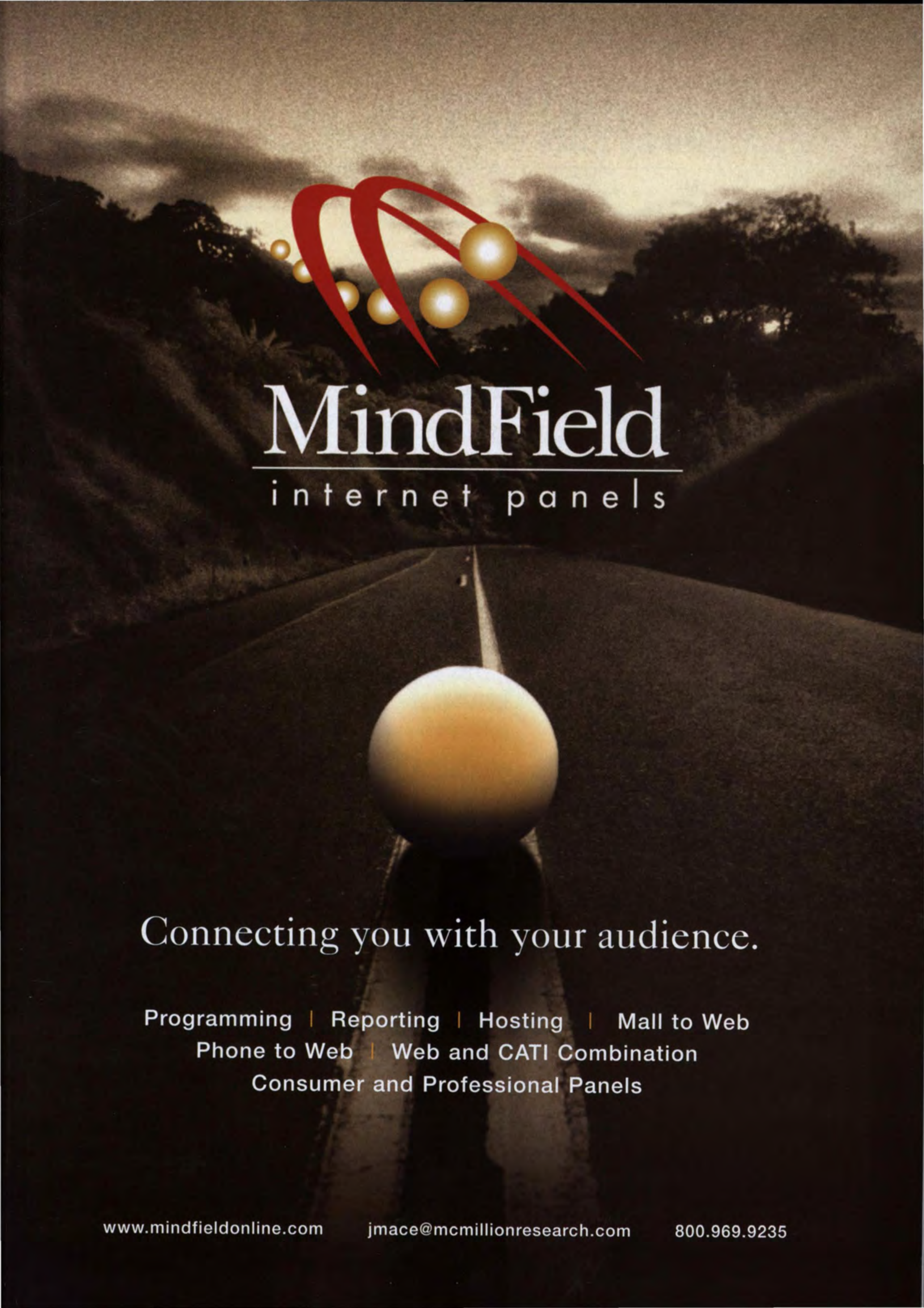
Boston-based *Aberdeen Group* has named **Paula Rosenblum** director of retail research.

Richard Windle has returned to *Ipsos UK* after 18 months at BMRB. He joins **Liz Landy** as joint managing director of Ipsos-RSL, the firm's media and social division.

Synovate has named **Audrey Tan** executive director - international research. In addition, **Tim Bush** has been named senior vice president and general manager of Synovate Diversity.

Perseus Development Corporation, a Braintree, Mass., research firm, has named **Dwight Galler** vice president of marketing. In conjunction with Perseus opening a new office in Toronto, **Valarie Koziol** has been named president of Perseus Canada.

New York-based *IAG*, a TV ad effectiveness ratings company, has named **Barbara Zack** managing director, chief strategic officer.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Perception Studies May 2004

Michael Mallett, CEO
Corporate Research International
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Every month, Corporate Research International will be conducting free market research studies for random companies and posting the results in Quirk's magazine. Last month two companies, Papa Johns International and Hardee's Food Systems, Inc. were interested in the perceptions of possible customers that are watching their carbohydrate intake. The full interactive study is available at **www.mysteryshops.com/quirks**.

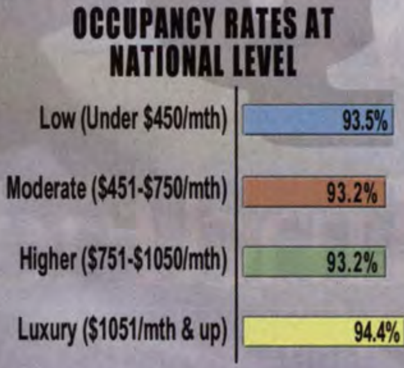
Effects of INCENTIVES/AMENITIES on Apartment RENTALS

This month a National Multi-Family REIT requested CRI to conduct a study based on the current occupancy rates and the effects that incentives and amenities have on a national basis.

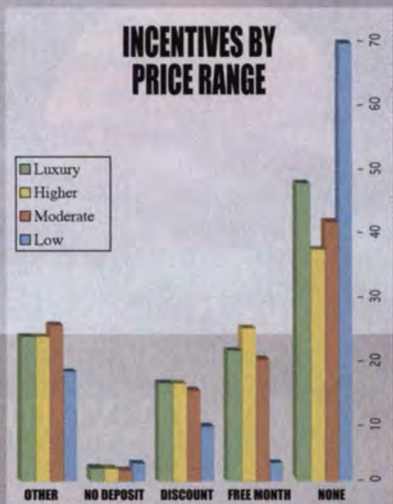
For this month's project, we utilized approximately 5000 of our auditors to conduct mystery shops throughout the US. The auditors were randomly assigned to Apartment communities with varied price ranges, and used a set criterion of questions. Auditors were instructed to indicate they were looking for a two bedroom, one bath apartment home, and were particularly interested in what renting incentives and amenities the communities had to offer.

The study took place during the first two weeks of April and was separated by the different rental price ranges.

The survey demonstrated that on a National level, Occupancy Rates average 93.6% across all rental price ranges.



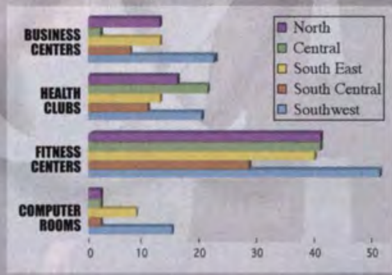
Any combination of the following incentives were being offered to lure prospective residents, such as first month rent free, a discounted deposit and waiving of the deposit. Differences in rental ranges had little effect on the incentives being offered, as the averages vary only slightly, with the exception of the Low rental range.



In addition the auditors focused mainly on specific amenities being offered, these were Computer Rooms, Fitness Centers, Health Clubs & Business Centers.
The national Average of these amenities were:

12% ...Computer Rooms
40% ...Fitness Centers
16% ...Health Clubs
15% ...Business Centers

However the types of amenities offered vary across the country:



Our findings in this category indicate that in the South West and South East Regions that Computer Rooms are offered more readily than in the other regions, (14% & 8% vs. 2%). Additionally, all regions with the exception of the Central Region, have similar business center averages. All other area averages vary only slightly on the fitness centers and health clubs amenities.

Stay tuned for next month's survey.

Contact Michael Mallett to have a
Free Market Research Study
performed for the next issue of *Quirk's*.

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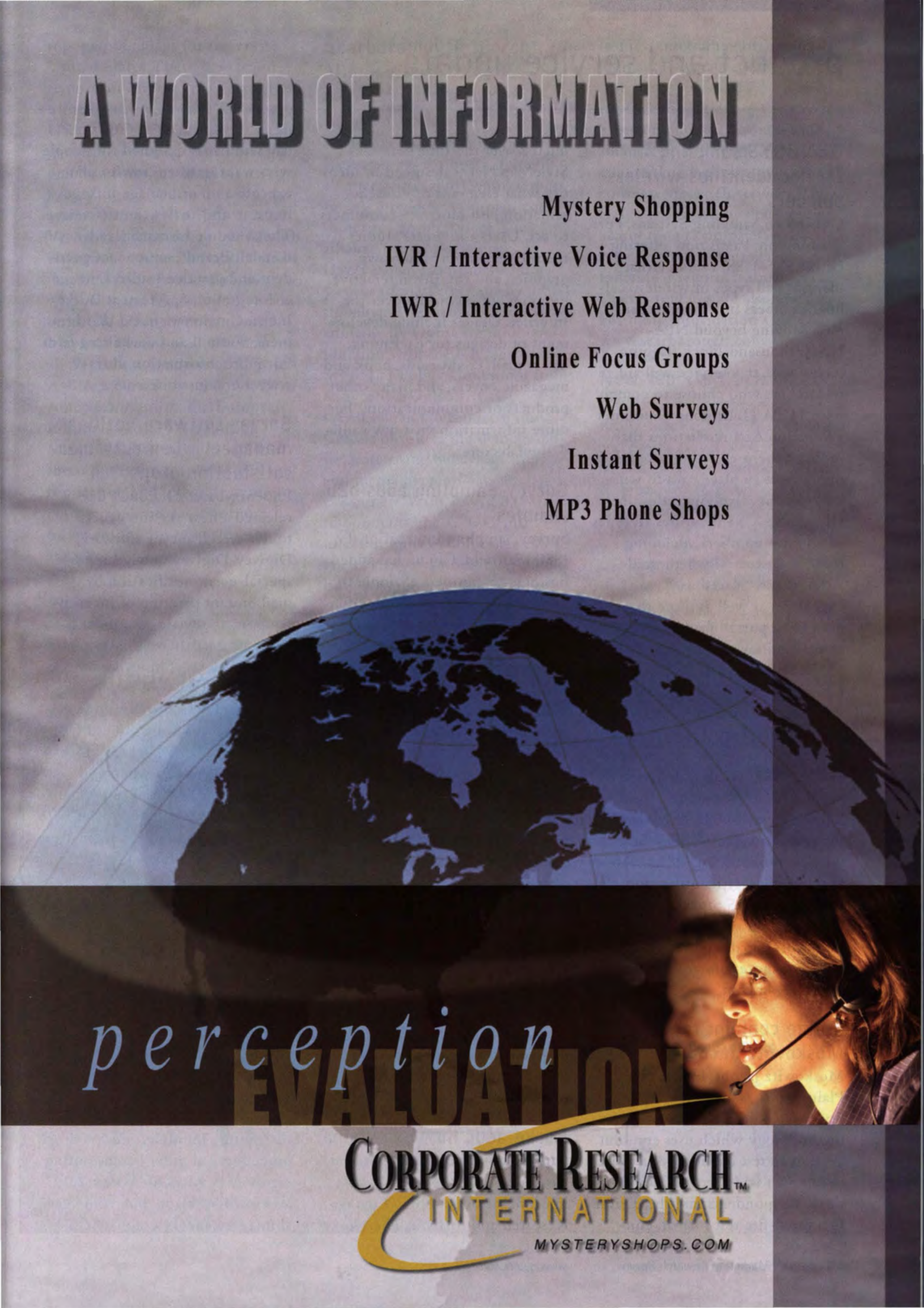
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GENESYS sampling service identifies wireless numbers

GENESYS Sampling Systems, Fort Washington, Pa., is now offering GENESYS-CSS, a service that identifies all types of wireless/cellular numbers in telephone samples. Moving beyond NPA-NXX/thousand-block flagging techniques, this service will aid researchers who choose to comply with TCPA (Telephone Consumer Protection Act) restrictions that prohibit the use of automated dialing devices to place calls to wireless/cellular telephone subscribers. GENESYS-CSS identifies all types of wireless numbers, including those in historically dedicated wireless and "mixed use" exchanges as well as those that have been ported from conventional landline service. All telephone samples (e.g., RDD, listed household, customer lists, etc.) are virtually certain to already contain wireline numbers that have been ported to a wireless/cellular carrier. GENESYS-CSS is designed to protect survey researchers from knowingly and willfully violating the restrictions on dialing these wireless numbers. In addition to wireless number identification, the GENESYS-CSS process enhances identification of both business and non-working/disconnected numbers. For more information visit www.m-s-g.com.

Online conjoint tool from Moskowitz Jacobs

Moskowitz Jacobs, Inc., White Plains, N.Y., is now offering StyleMap.Net, a Web-based methodology which uses conjoint analysis to test elements of a visual design in a wide array of combinations. Respondents rate the designs in a rapid-fire test format, conducted over the Internet. StyleMap.Net is designed to identify what elements of visual presentation best motivate consumers to act. Users can create studies themselves, import their own graphics, and run this interactive program automatically over the Internet. Usages include development of designs for packaging, direct mail, credit cards, book and magazine covers, and many other products or communications. For more information visit www.mjidesignlab.com.

Survey Sampling adds b2b samples

Survey Sampling International (SSI), Fairfield, Conn., has added business-to-business eSample to its SurveySpot Internet sample offerings. With more than 100 selection criteria, SurveySpot B2B sample targets all levels of business executives, owners, decision-makers, industry members, and purchasers, including C-class executives such as CEO, CFO, COO, and information technology professionals with systems, network, software, or telecom decision-making responsibilities. Business-to-business eSample selections include: occupation; general job titles; technology-related job titles; areas of responsibility; industry; number of employees within the U.S.; annual U.S. sales revenue; number of PCs worldwide; and decision-maker or influencer (i.e., automobiles/auto services, Internet services, travel/transportation). For more information visit www.surveysampling.com.

Burke adds linkage seminar

Cincinnati-based Burke Institute has added a new seminar to its line-up: Introduction To Linkage Research and Analysis. The two-day seminar is designed for people who want to learn how to plan, execute and/or manage linkage research and analysis initiatives. The scheduled seminar leader is Randall Brandt, senior vice president and practice leader, Linkage & Integration Services, at Burke Inc., a Cincinnati-based management research and consulting firm. For more information visit www.burkeinstitute.com.

Survey software notifies managers when customer satisfaction drops

Phoenix-based Diatouch has released a new version of its touch-screen survey software, Digivey. Digivey newly supports special-event notification by e-mail, instant printing of incentive coupons to reward respondents, and 365/24/7 survey station monitoring with its eSurvey Guard feature. The survey tool can be used with Windows- and Windows CE-based devices - from tablet PCs to freestanding touch-screen kiosks - to conduct surveys when and where needed. All the respondents have to do is touch an answer with their finger. For more information visit www.digivey.com.

Version 2.0 of Map-In-A-Box

East Lansing, Mich.-based Mapping Solutions LLC is now offering version 2.0 of its Map-In-A-Box for MapInfo Professional product. This new release includes street-level routing and proximity analysis harnessing the Microsoft MapPoint routing engine. Proximity analysis includes a "find the nearest" module, sales territory modeling and other batch routing capabilities. Map-In-A-Box 2.0 also includes black-and-white aerial imagery and 16 color USGS topographic maps for the entire United States. These new features require an Internet connection utilizing the Microsoft TerraServer USA Web service to download and georeference images. Large-scale printing from the MapInfo Professional layout window is now available in Map-In-A-Box 2.0. Vectorized data can be mixed with multiple oversized images of street maps, aerial images and topographic maps. Map-In-A-Box runs on the Windows platform with MapInfo Professional 6.0 (and above). Three versions of Map-In-A-Box are available: the Northern American Edition, the European Edition and the Solo Edition. Map-In-A-Box 2.0 also includes the support for MapBasic customization and integration into custom applications. For more information visit www.mapinabox.com.

Scarborough Research alliance to provide gay/lesbian consumer insights

New York-based Scarborough Research has formed a strategic alliance with OpusComm Group, Inc. to provide gay/lesbian consumer research services. The alliance brings the annual Gay/Lesbian Consumer Online Census to marketers, media professionals and agencies. Conducted annually by OpusComm in conjunction with the S.I. Newhouse School of Public Communications at Syracuse University, the Gay/Lesbian Consumer Online Census measures the demographics, purchasing behaviors, lifestyles and media usage of gay/lesbian consumers. With almost 8,000 respondents, the G/L Census offers insights in consumer categories such as automotive, childcare, computer equipment, electronics, entertainment, financial, food and beverage, home and garden, pets, sports and fitness and travel as they relate to the gay/lesbian community. Through the alliance, Scarborough Research's sales staff adds this study to its consumer research services. The G/L Census will be delivered via Scarborough's proprietary PRIME NExT software platform. Individual reports featuring G/L Census findings are also available. For more information visit www.scarborough.com.

New reports track hotel trends

Professional services firm Deloitte and Smith Travel Research have launched HotelBenchmark Trend Reports, which provide access to global hotel performance trends based on market coverage of over

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News notes

Greenwich, Conn.-based **NFO WorldGroup** has rebranded its core U.S. business, historically known as NFO Research, as TNS NFO. In July 2003, TNS acquired NFO WorldGroup from the Interpublic Group of Companies. Other operating units of NFO WorldGroup have been similarly renamed to reflect their new association with TNS: NFO Research is now TNS NFO; NFO Prognostics is now TNS Prognostics; NFO Automotive is now TNS Automotive Sector; NFO InCom is now TNS Telecoms Sector; NFO Plog is now TNS Transport, Travel and Hospitality Group; NFO Financial Services is now TNS Financial Services Group; NFO FYI is now TNS FYI. In Canada, NFO CFgroup is now TNS Canadian Facts.

The *Houston Business Journal* reported in March that New York-based **Arbitron** is considering Houston as a new market in which to launch its Portable People Meter.

Calendar of Events May/September

The American Association for Public Opinion Research will hold its annual conference on May 13-16 in Phoenix. For more information visit www.aapor.org.

Anderson, Niebuhr & Associates will hold a questionnaire design and use workshop on May 13-14 in Minneapolis. For more information call 800-678-5577 or visit www.ana-inc.com.

The Mystery Shopping Providers Association will hold its annual conference on May 13-15 at the Metropolitan Hotel Toronto. For more information visit www.mysteryshop.org.

Canada's Professional Marketing Research Society will hold its annual conference and trade fair on May 17-18 at the Liberty Grand Entertainment Complex in Toronto. For more information visit www.pmrs-aprm.com.

The Business & Industrial Group will hold its annual business-to-business research conference on May 19-21 at the Marriott St. Pierre, Chepstow, England. For more information visit www.bigconference.org.

LIMRA International, an association providing research and consulting services to insurance and financial services companies, will hold its annual marketing research conference on June 2-4 at Disney's Grand Floridian Resort & Spa, Lake Buena Vista, Fla. For more information visit www.limra.com.

The Marketing Research Association will hold its annual conference in Boston on June 9-11 at the Sheraton Boston. For more information visit www.mra-net.org.

The American Marketing Association will hold its annual Advanced Research Techniques Forum on June 13-16 at the Westin Resort & Spa, Whistler, B.C. For more information visit www.marketingpower.com/artforum.

The European Society for Opinion and Marketing Research and the Advertising Research Foundation are co-sponsoring the Worldwide Audience Measurement conference (online, outdoors/out-of-home, print, media mix, radio, TV) on June 13-18 in Geneva, Switzerland. For more information visit www.esomar.org.

The Council of American Survey Research Organizations will hold its annual technology conference on June 17-18 at the Roosevelt Hotel, New York City. For more information visit www.casro.org.

The Institute for International Research will hold Shopper Insights in Action, a research-oriented retailing conference, on July 12-14 at the House of Blues Hotel, Chicago. For more information visit www.iirusa.com/insights.

The American Marketing Association will hold its annual marketing research conference on September 19-22 in New Orleans. For more information visit www.marketingpower.com.

The European Society for Opinion and Marketing Research will hold its annual congress on September 19-22 in Lisbon. For more information visit www.esomar.org.

Acquisitions

New York-based **Arbitron Inc.** has acquired **Marketing Resources Plus** from Interactive Market Systems, Inc., part of the VNU Media Measurement & Information Group, for $8.9 million in cash. Based in Indianapolis, Marketing Resources Plus is a provider of media buying software systems to local and regional advertising agencies for broadcast and print media.

Paris-based **Ipsos** has acquired a 51 percent stake in the Korean research firm **Active Insights Korea, Inc.** Based in Seoul, Active Insights, formerly known as NFO Korea, was established in 1994 by Yeong Wook Joo. The company generated $4.5 million in revenue during the last fiscal year. Active Insights, soon to be Ipsos Insight Korea, employs 57 full-time staff and has a network of more than 500 interviewers.

Harris Interactive, Rochester, N.Y., has announced **IMAS International**, a full-service research company in Poland, as the newest member of the Harris Interactive Global Network. IMAS International, an Austrian and Polish joint venture started in 1994, operates as a part of a network of IMAS institutes offering full service in Germany, Austria, Switzerland, the Netherlands, Hungary, the Czech Republic, Slovakia and Poland.

Fort Washington, Pa.-based **Marketing Systems Group** has acquired ARCS (formerly part of DBM Associates, White House Station, N.J.), a supplier of interactive voice response (IVR) products. The ARCS system provides a set of

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 By Brad Bennett

Ethnography makes the *human connection*

The framed and matted sentiment hung on a wall near the front door of Carol's home:

"A hundred years from now it will not matter how much I earned, what my job title was, or what type of car I drove, but the world may be different because I touched the life of a child."

Most people who noticed it would think of it as an endearing memento similar to her grandmother's teacup on the shelf in the dining room or the clay pot she made that sits on her kitchen windowsill. But to an ethnographer who had spent two hours interviewing her in her home, it embodied the way Carol lives her life. Right now she is focused on giving her kids a solid foundation on which to build their own lives.

The inspirational saying explains the placement of the TV in her kitchen, when it's allowed to be on and what shows are watched. It explains the automobile in the driveway and the recent addition to her house. It explains her part-time job and the food in the fridge. It explains many things about the choices she makes - choices that we as marketers are keenly interested in.

It is unlikely that Carol would have mentioned the saying if she were participating in a focus group. We wouldn't have captured it in a telephone survey or an online survey. She wouldn't have mentioned it in the ethnography if we hadn't been there to see it and ask about it, but it brought tears to her eyes as she explained how the sentence captures the essence of her life at this point.

Human family

Ethnographic marketing research has anthropological roots in which the study of the human family is used to define and understand individual societies. In marketing research, the term ethnography has been broadened beyond the study of the family to include many aspects of a person's life including work, home, recreation, shopping and more.

Typically an ethnographic interview lasts anywhere from one hour to an entire day and is focused on one individual. This allows the ethnographer and the respondent to develop a rapport that is open and relaxed, one that makes the respondent comfortable to share freely about various aspects of their life. The ethnographer can then explore issues much more thoroughly to uncover the underlying insight.

Brad Bennett is president of B. Bennett Company, a Wheaton, Ill., research firm. He can be reached at 630-221-9833 or at brad@bbennettco.com.

The research is typically conducted on the respondent's own turf - in their home, workplace or other places in which they spend time. Often the interview is augmented with a discussion among family members, friends or coworkers. The way the environment is organized, the flow of activities and the interactions of the people all contribute to a richer and more complete understanding of why the respondent makes the choices they do.

Ethnographic research reports typically contain visual findings in the form of photographs or video. The framed saying hanging on Carol's wall was certainly part of the data from the study because it was reflec-

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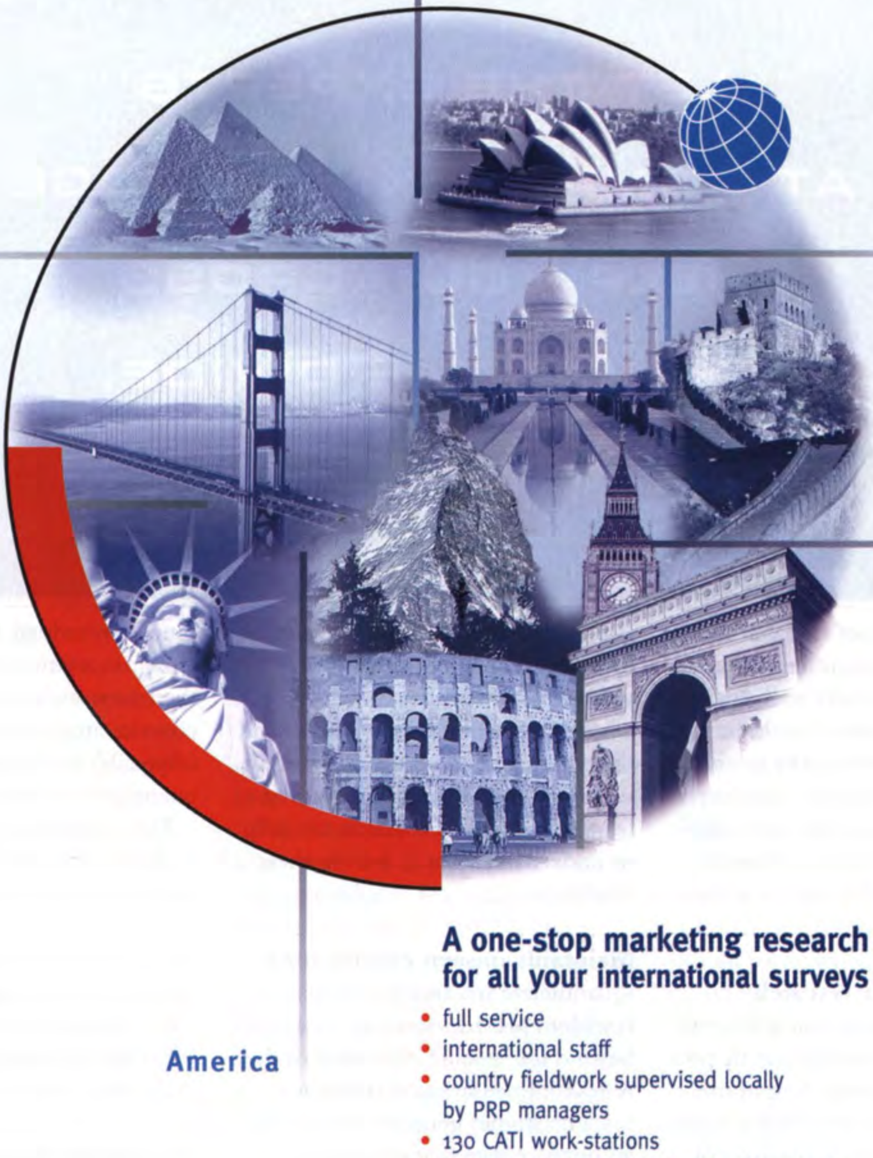

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tive not only of Carol's life, but the lives of other women in her same target group. This type of visual data helps to quickly convey concepts that are difficult or cumbersome to communicate with words. It is also helpful when communicating with audiences who tend to absorb information more effectively when it is visually presented.

Illuminates other research

Ethnographic research complements other research methodologies by providing a solid understanding of the customer's motivations. In addition to addressing the specific objectives of the study, ethnographies often shed new light on past or ongoing research and allow you to connect research findings that previously appeared to be unrelated.

For example, concept tests are valuable in telling us if we have a viable product idea, but they don't help us understand the customers' reasoning behind their ratings of the concept or how it could be improved. Tracking studies give us a pulse of what is going on with our target but seldom help us understand the real story behind the changes we see in the data. The insights gained from ethnographic research can help us understand what is driving these results.

Maintains unseen connections

Quantitative research is essential but it seldom provides strategic direction beyond the specific objectives of the research. In addition, quantitative research studies generate vast amounts of data that must be collapsed and consolidated. While necessary, this process often conceals some of the richest insight. The relationships between the answers are often lost.

Skilled ethnographers make connections within an interview and across multiple interviews so that much of this richness isn't lost. Verbal data from the interview is also combined with visual data captured by close observation of respondents and their surroundings. As a result, discoveries are made that are nearly impossible to bring to light with quantitative research.

Ethnographies provide a great reservoir from which to draw a vast array of attitudes, motivations and behavior - many of which would not be self-reported in other research venues. These insights can be helpful when constructing quantitative studies, which, after all, are only as good as the questions they contain.

Humanizes data

Many organizations have libraries filled with marketing research, but the teams of people making decisions on behalf of the customers have almost no human connection with customers. People are complex and we try to define and describe them with data, yet we often come up short of truly understanding our target. Ethnographies provide insight

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that humanizes data so that your team can powerfully market to individuals, not just faceless groups of customers. When we define customers as "segments," "user groups" and even "consumers," something is missing: a connection to real people that comes through our marketing efforts in obvious and not so obvious ways.

We've all been in settings in which a speaker was talking to a large audience. The topic should have been of interest to us, but somehow the speaker didn't capture our attention or imagination. More rarely, we have been in settings where it seemed as if the speaker was speaking directly to us, perhaps so much so that it made our heart race to hear them speak. In some way the speaker understood us on an individual level, even though they were addressing an entire group. They have an insight into us that resonates and commands our attention. Ethnographic research can help marketers find ways to make similar connections with their customers.

Keys to successful ethnographies

The insight gained from ethnographic research will be heightened if you keep three important things in mind.

First, don't try to turn ethnographic research into a quantitative tool. It takes remarkably few interviews to expose real insight. Themes emerge, common phrases surface, idiosyncrasies come to light and shared behaviors are identified with relatively few interviews. Depending on the issues and objectives of the study, it seldom requires more than six to eight respondents per target group.

Second, take great care in defining the respondent qualifications for the ethnographies. In many research studies it is important that the respondents represent the entire target. When conducting ethnographies, it is far more important to talk to the heart of your target rather than people who broadly represent your target.

Recruit people who represent the core. They may be your heaviest users or the heaviest users of your competitor's product. They may be people who exhibit a behavior that you want to tap into. Generally, you want to be far more focused in your screening than in other research methodologies.

Third, make sure key team members participate in the ethnographies. A broad cross-section of your team should participate, with one person accompanying the ethnographer on each of the interviews. While unsettling to many team members at first, the impact of getting them to step out of their comfort zone and into the customers' lives is significant. Most people who are making day-to-day decisions in our businesses live far from the customers and have lifestyles that are vastly different. Giving them the opportunity to interact directly almost always recalibrates their perspective and helps them ground their big and small business decisions in the realm of the customer. | Q

By Michael D. Lieberman

Using **conjoint analysis** to shape a *political message*

Conjoint analysis is in the "trade-off" family of market research techniques. It has proven to be profoundly useful in helping marketers shape new products, determine maximum levels of product enhancement and predict market share. In addition, conjoint analysis can be used to identify the best advertising message by revealing the features that are most important in product choice.

Essentially, trade-off analysis allows the researcher to throw all of his or her options - such as various features, price ranges, brand names, etc. - into a carefully constructed questionnaire. Respondents are asked a series of product purchase interest questions. The data are then run through the black box of conjoint procedures that yield mathematical results called utility scores. These models allow the researcher to simulate the marketplace in great detail with surprising accuracy.

In a real purchase situation consumers do not make choices based on a single attribute. Consumers examine a range of features or attributes and then make judgments or trade-offs to determine their final purchase choice.

This is as true with the "choice" made in political situations, such as assessing the viability of a candidate, determining the underlying roots of issue support - such as gun control, housing reform or budgetary management - or choosing a tactical strategy when pushing legislation. This analysis, when used properly, can provide insight to the governor when he sets policy priorities or assesses main concerns dominating voters' minds as the election nears.

Editor's note: Michael Lieberman is founder and president of Multivariate Solutions, a statistical and market research consulting firm. He can be reached at 212-656-1711 or at michael@mvsolution.com.

This article will review two constructs of conjoint that are specifically suited to political applications. These particular conjoint approaches can be administered over the phone or on the Internet, which keeps costs and timing manageable (very important in a flash poll). Also, the results can be easily filtered by key voter groups in order to compare them to each other and assess the relative importance of issues within each group.

First model: assessing levels of preference

The first model looks at different levels of the day's key issues. Its goal is to measure the preference


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-Greenfield Online panelist
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between each issue, and then construct a simulation model allowing political planners to find the optimum policy pie or the cost of circumstances on approval ratings. In this case we are going to be looking at three key voting groups across three political issues in the imaginary state named Utopia. They are summarized below.

Key Voter Groups	Issues
Young Adults 18-24	State Unemployment
Working Adults 25-54	Property Taxes
Retirement on the Radar 55+	Utopia State Budget

For each issue, varying levels are tested.

Unemployment

- 2 percent
- 4 percent
- 6 percent

Property taxes

- Low
- Medium
- High

Utopia state budget

- Balanced budget
- State budget deficit of $5 billion
- State budget deficit of $10 billion

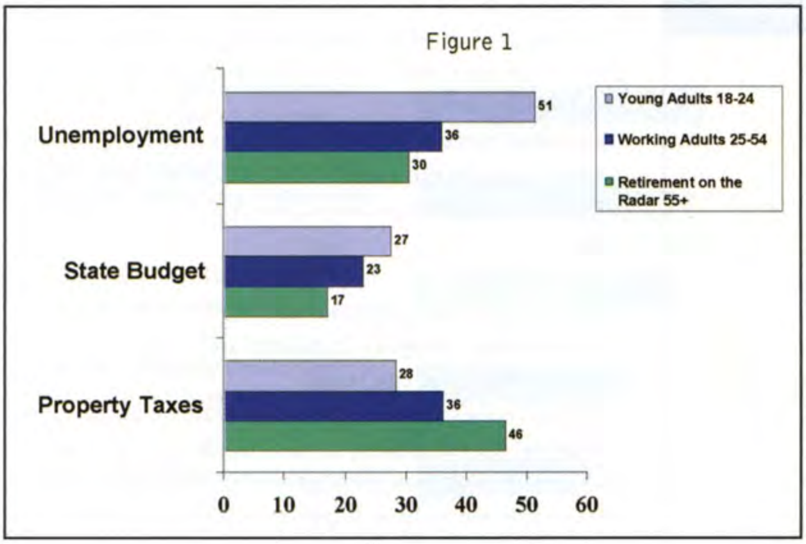
In order for the conjoint analysis to work, a computer-generated plan for the survey is run to make the outcome statistically viable. In the above case, with three issues each containing three levels, the respondent would be asked to rate nine choice scenarios. Below is an example of how a few choice scenarios might look:

Unemployment	Property Taxes	Utopia State Budget
Unemployment at 6%	High	Balanced Budget
Unemployment at 2%	Medium	Budget Deficit of $10 Billion
Unemployment at 6%	Low	Budget Deficit of $10 Billion

The survey can be done in two ways. The first is to present the respondent with each of the nine scenarios and ask him/her to rank them. However, this can be difficult over the phone - it is a challenge for a person to hold nine concepts in his head - and requires special Web programming in order for all nine scenarios to be seen on one screen.

The second method for administering the survey is to ask the respondent to rate the state government given the following conditions on a finite scale, say 1 to 10. A sample question would look like this: "On a 1-to-10 scale, how would you rate the Utopia state government under Governor Bob Perfect if unemployment is at 2 percent, property taxes are high, and

People have always talked with their hands.



the budget deficit is at $5 billion?"

In our example, each respondent would be asked to rate nine similar questions.

The output has two levels, the first is an importance for each issue. Next, a second utility score for each level of each attribute. The first gives us the relative importance of each issue, the second allows us to gauge how much support would drop if inflation went from 2 percent to, say, 6 percent.

Figure 1 summarizes the aggregate results of the importance of each issue broken down by voter group.

Evidently, younger people are more concerned about finding work and have a relatively higher concern for balancing the state budget than older voters. For working adults, unemployment and property taxes are equally troubling, while seniors want to pay low property taxes.

Figure 2 shows the utility scores for each attribute for the entire population - the conjoint procedure also generates utility scores for each voter group though they are not shown here. There are two ways to utilize these numbers. The first is to eyeball them and assess the relative strength of each of the utility scores. Obviously, for the whole population, the incremental loss of utility due to higher property taxes is the primary concern.

Another useful measure is to see what the relative loss of support would be, given a certain event. For example, the top utility sum - 2 percent unemployment, balanced budget and low property taxes - is 9.38. If local property taxes rise from low to medium

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Figure 2: Summary Utilities for Total Population

Unemployment	**39.76**
2%	3.46
4%	1.78
6%	0.46
State Budget	**22.33**
Balanced Budget	1.56
Deficit $5 Billion	1.24
Deficit $10 Billion	1.02
Property Taxes	**36.87**
Low	4.36
Medium	2.21
High	1.90

due to state budget cutbacks, the utilities sum drops to 7.23 - a loss of about 23 percent. This translates directly into support lost for the governor.

Obviously Governor Perfect does not want that to happen. If unemployment stays at 2 percent and property taxes stay low, but the governor has to operate with a $5 billion deficit in order to help municipalities keep their taxes low, the score goes to 9.06 - a loss of 5 percent. It's clear the governor should undertake deficit spending in order to keep property taxes down. He should also be sure to keep unemployment as low as possible. That affects him as well. A jump of 2 percent in unemployment means a drop in utility of around 18 percent.

Second model: shaping the message

In the second variation on conjoint, all issues that are included have only two levels: either included in the campaign/speech/advertisement, or not. For example, a candidate has six campaign issues that he has specified. Which of those should he emphasize in his campaign? Or, during his State of the State speech, in what order should Governor Perfect present the key challenges facing Utopia?

Below is a list of six issues that might appear in a gubernatorial/senate race or State of the State address:

• ending runaway development in Utopia;
• reducing traffic congestion on Utopia's highways;
• improving the quality of teaching in our classrooms;
• gun control;
• protecting the environment;
• improving Utopia's economy and increasing the number of jobs in the state.

For six issues the computer generates eight choice scenarios. An example question might be, "If a candidate's main platform were gun control and protecting the environment, how likely are you to vote for him?" Or, "In his State of the State address, Governor Perfect plans to emphasize 1) ending runaway development in Utopia, 2) improving the quality of teaching in our classrooms, and 3) protecting our environment. How important would it be for you to hear his speech?"

The output would look like Figure 3, which is a summary of relative importance scores once the analysis is complete.

Here we are concerned only with the importance of each main attribute. The conjoint analysis reveals that Utopians are concerned more about traffic, the state's economy and the quality of teachers. The environment and gun control, in an urban state like Utopia, are low down on the list.

This variable can be also be filtered easily by key voter groups, so when the governor goes to speak, say, in front of a group of Democratic women, he can quickly filter the analysis, rerun the program and get utility scores for this group's preference of issues.

Applications for advertising research

The applications of conjoint analysis described above can be easily used in advertising and marketing research simply by changing the labels from "candi-

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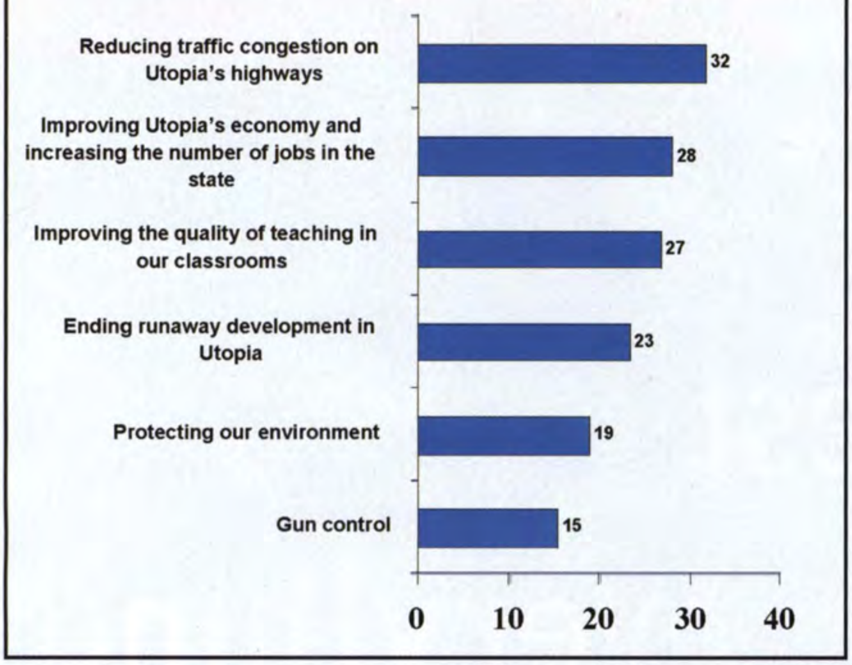
Figure 3



date" to "product."

In the first example, instead of using the conjoint analysis to set action plans for Governor Bob Perfect's Utopian State agenda, it can be used to plan product manager Bob Perfect's newest toothpaste. "State Unemployment" becomes "Tube Size," "Property Taxes" becomes "Flavor," and "State Budget Gap" becomes "Box Design."

In the second application, instead of shaping the message for the governor's reelection, you could design a magazine cover by testing the presence or absence of logos, or the impact of colors or article teaser font sizes. Trumpet the preferred advantages of your bank's credit card based on what is important to the consumer. Or advertise your client's newest cellular telephone based on sound research.

Crystal ball

Not every dollar spent in political campaign (or consumer product) advertising is created equal - some of those dollars generate far more impact than others. Indeed, it seems that if one only knew beforehand which dollars to spend, and at whom they should be directed, success would be far more certain. Conjoint analysis can be, in large measure, that crystal ball. | Q

By Stephen J. Hellebusch

Let's test everything

The logic of statistical (stat) testing is not complex, but it can be difficult to understand, because it is the reverse of everyday logic and what normal people expect. Basically, to determine if two numbers differ significantly, it is assumed that they are the same. The test then determines whether this notion can be rejected, and we can say that the numbers are "statistically significantly different at the (some predetermined) confidence level."

While it is not complex, the logic can be subtle. One subtlety leads to a common error, aided and abetted by automatic computer stat testing - overtesting. Suppose there is a group of 200 men and one of 205 women, and they respond to a new product concept on a purchase intent scale. The data might look like that shown in Table A.

Statistical logic assumes that the two percentages to be tested are from the same population - they do not differ. Therefore, it is assumed that men have the same purchase interest as women. The rules also assume that the numbers are unrelated, in the sense that the percentages being tested are free to be whatever they might be, from 0 percent to 100 percent. Restricting them in any way changes the probabilities, and the dynamics of the statistical test.

Table A
Purchase Intent Among Men and Women

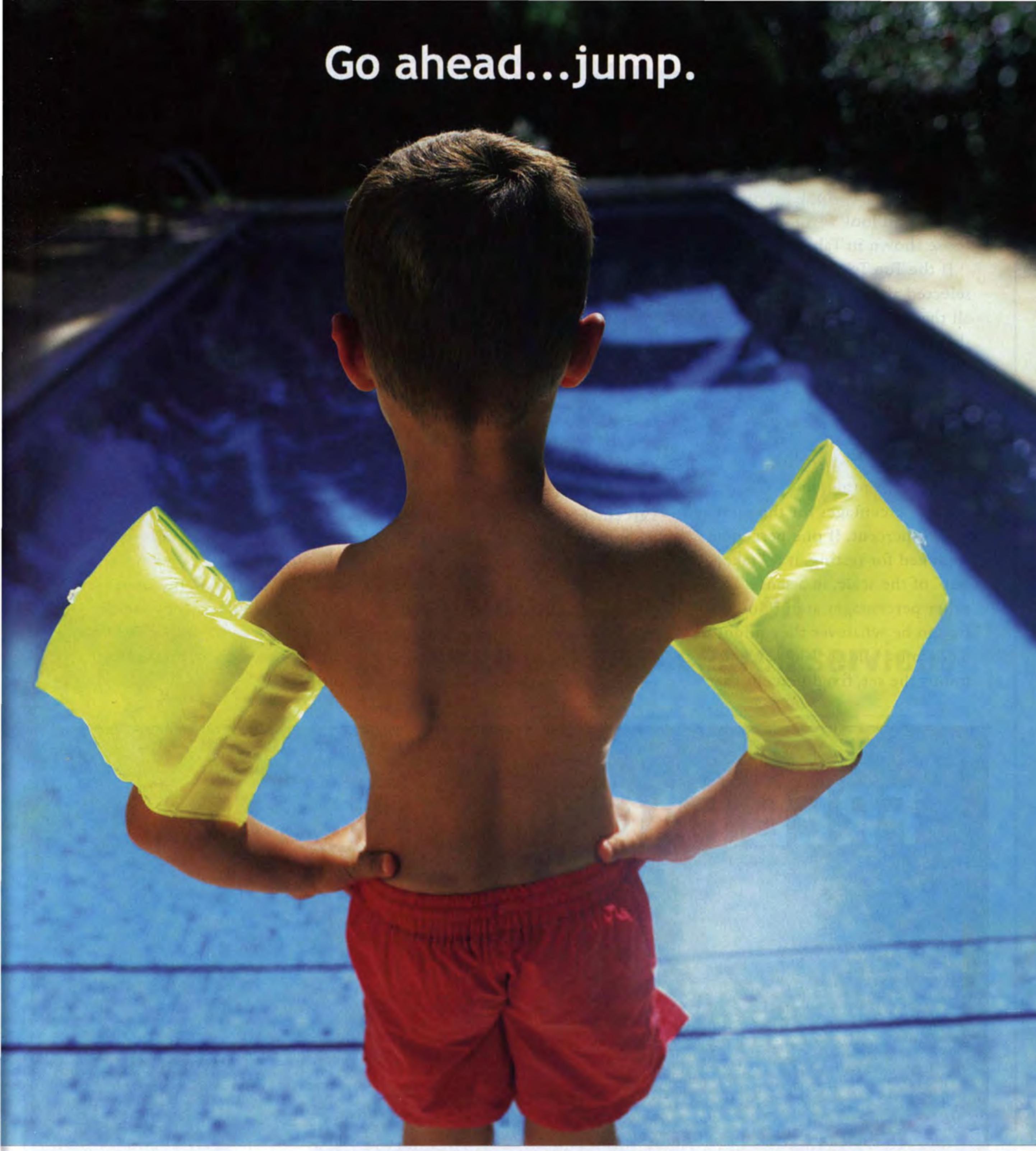
Base: total per group	Men (200) %		Women (205) %
Definitely would buy	3		21
Probably would buy	10		19
Def./Prob. would buy	13	s	40
Might or might not buy	40		35
Probably would not buy	30		20
Definitely would not buy	17		5
Total	100		100

S = the percentages differ significantly at the 95% confidence level.

The right way to test for a difference in purchase intent is to pick a key measure to summarize the responses, and test that measure. In Table A, the Top Two Box score was tested - the combined percentages from the top two points on the scale ("definitely would buy" plus "probably would buy"). Within the group of men, this number could have turned out to be anything. It just happened to be 13 percent. Within the group of women, it could have been anything, and, as it turns out, was 40 percent. Within each group, the number was free to be anything from 0 percent to 100 percent, so picking this percentage to test follows the statistical rule. The stat test indicates that the idea that these percentages are from the same place (or are the same) can be rejected, so we can say they are "statistically significantly different at the 95 percent confidence level."

Something different often hap-

Editor's note: Stephen J. Hellebusch is president of Hellebusch Research & Consulting, Inc., Cincinnati. He can be reached at 800-871-6922 or at info@hellrc.com.



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800.923.5523 www. decipherinc.com email sales@decipherinc.com pens in practice, though. Since the computer programs that generate survey data do not "know" what summary measure will be important, these programs test everything. When looking at computer-generated data tables, the statistical results will look something like those shown in Table B.

If the Top Two Box score is selected ahead of time, and that is all that is examined (as in Table A), then this automatic testing is very helpful. It does the work, and shows that 13 percent differs from 40 percent. The other stat test results are ignored. However, if the data are reported as shown in Table B, there is a problem.

The percentages for the men add to 100 percent. If one percentage is picked for testing, it is "taken out" of the scale, in a sense. The other percentages are no longer free to be whatever they might be. They must add to 100 percent minus the set, fixed percent that

Table B
Purchase Intent Among Men and Women

Base: total per group	Men (200) %		Women (205) %
Definitely would buy	3	s	21
Probably would buy	10		19
Def./Prob. would buy	13	s	40
Might or might not buy	40		35
Probably would not buy	30		20
Definitely would not buy	17	d	5
Total	100		100

S = the percentages differ significantly at the 95% confidence level.
d = the percentages differ directionally at the 90% confidence level.

was selected for testing. Percentages for the men can vary from 0 percent to 87 percent, but they can't be higher, because 13 percent is "used up." Similarly, percentages for the women can vary from 0 percent to 60 percent, but 40 percent is used already. When you look at testing in the other rows, or row by row, you are no longer using the confidence level you think you are using - it becomes something else.

Statistically, if one said of Table B that the percentages that "definitely would buy" and the percentages that "definitely/probably would buy" both differ at the 95 percent confidence level, it would be wrong. One of them does, but the other difference is at some unknown level of significance, probably much less than 95 percent, given one related significant difference.

Stat tests are very useful. Each one answers a specific question about a numerical relationship. The one most commonly asked about scale responses is whether two numbers differ significantly. If they are the right two numbers, and the proper test is used, the question is easily answered. If they are the wrong two numbers, or the wrong test has been used, the decision maker can be misled. | Q

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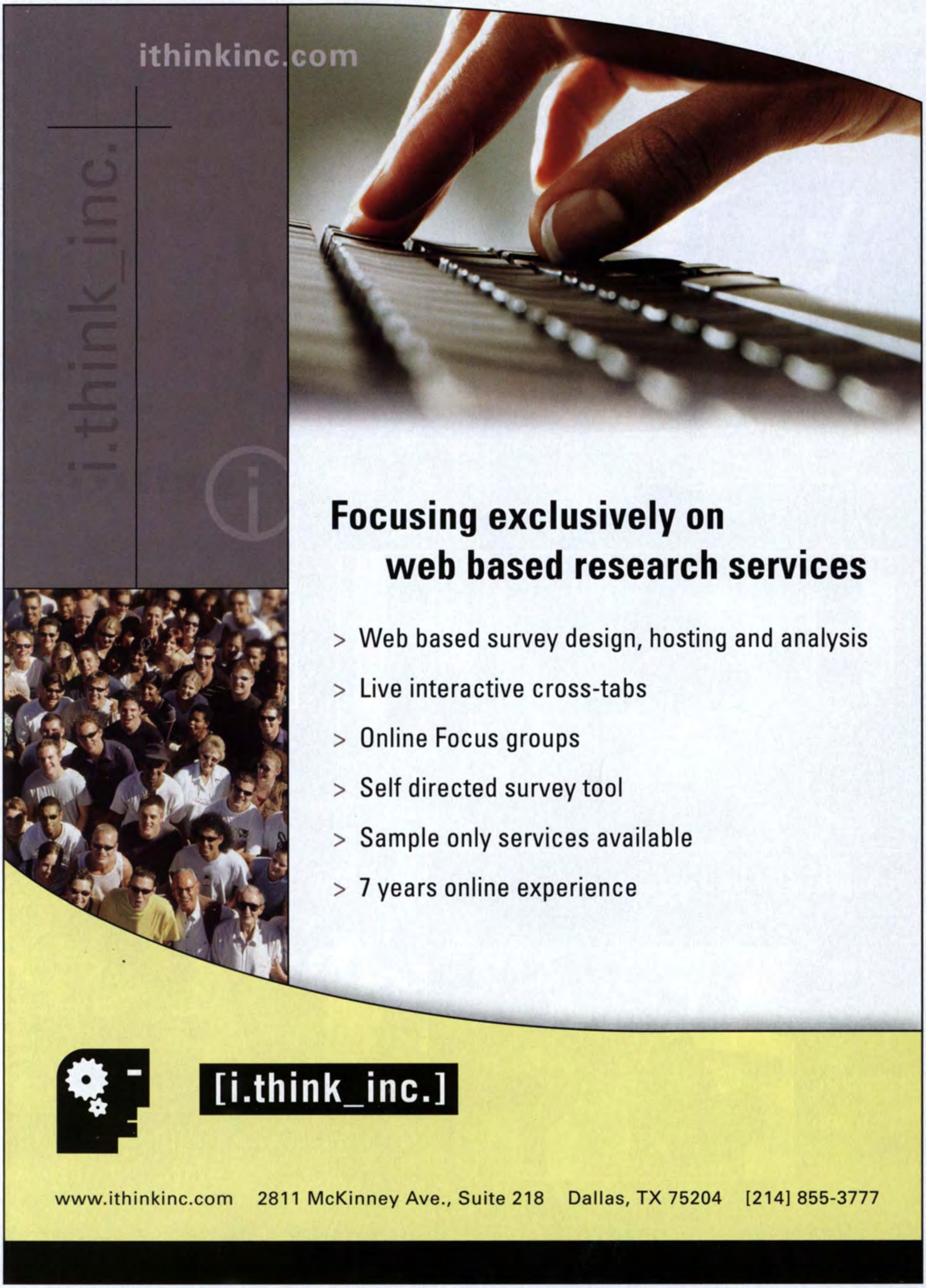

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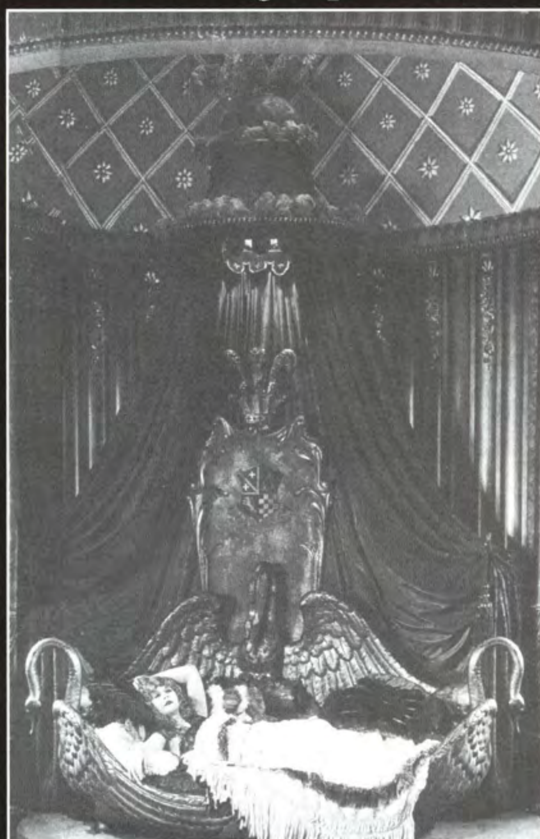

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By Michael Sosnowski

Segmentation success

A practical guide to the market segmentation research process

Segmentation research can provide your organization with a unique and competitively advantageous perspective on the marketplace. In practice, however, such studies can involve significant time and effort, and what constitutes a winning solution is not always clear. The benefits can be great, but the risks can be too.

So how do you avoid the common pitfalls of segmentation research and produce a useful, lasting outcome for your clients? No one approach is foolproof, but you can greatly enhance your odds of success by understanding and implementing a process-based approach to segmentation - one that begins with client needs and ends with an actionable, objectives-focused set of segments.

This article is meant to explain the basic building blocks of the segmentation process, and to provide you with a roadmap for implementation that will be of help regardless of industry or subject matter. These fundamental steps, more than any one technique or methodology, will determine the success of your research efforts and ultimately will influence management's perspective on the value of market research.

Editor's note: Michael Sosnowski is an account executive with The Response Center, a Fort Washington, Pa., research company. He can be reached at msosnows@response-center.com.

From the start, think about the finish

Successful segmentation research is heavily dependent upon buy-in from your clients, so it makes sense to seek their input right from the start. Work to clarify the objectives they have for this research, and take the time to understand the resources at their disposal. Brainstorm with them before writing a questionnaire or defining variables for use in your analysis, in an effort to answer two important questions.

• What is the ideal way to divide consumers for marketing purposes? Demographic groupings, attitudinal questions, and behavioral data all have advantages and disadvantages depending on what your clients see as "ideal" segments.

• What information is needed to best enable marketing action? Specifically, what data are needed to most help your clients target prospects, assemble offers, and communicate benefits to consumers within the various segments that are developed.

There is no guarantee, of course, that the final analysis of results will perfectly reproduce this view of the marketplace. Visualizing the end game, however, allows you and your clients to create a set of guiding principles that will inform the remainder of the project, and this in turn will ensure results that are as actionable as possible.

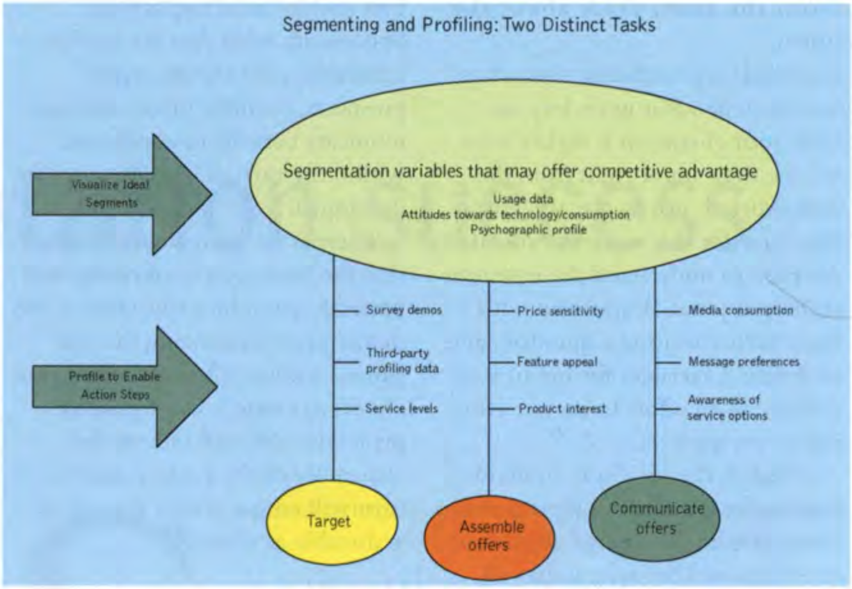
Focus the questionnaire design process

Segmentation research can be performed solely using variables available within a company's customer database. Frequently, though, client objectives require the collection of information not already in hand, and in these cases a questionnaire is needed.

It is likely to be lengthy, since for practical reasons segmentation studies commonly perform double duty as comprehensive market profiling exercises. The important thing to remember is that your ability to identify actionable groups of consumers will be closely tied to the nature of variables available, not just the number used. Ideally every question should somehow serve the goals of your segmentation effort. As the person guiding the research, ask yourself repeatedly: would this be a useful way to think about how consumers may differ in the market-

place? And, will this information help us market to different customer segments? If the answer to both of these is no, then that variable probably should not be included in the final questionnaire.

Also remember that the structure of questions can have great impact on your final solution. For example, asking consumers "How likely are you to purchase this service?" will produce different results than asking "Are you likely to purchase this service?" In the end, the principles that define the segmentation study should be referenced to decide upon wording that is most appropriate.



Carefully select variables for the analysis

It is not wise to include all possible survey and database variables in the segmentation analysis, regardless of technique used. This "kitchen sink" approach will only muddy the waters of analysis, and needlessly complicate your primary task: finding segments that are meaningful, reachable and strategically advantageous.

At the same time, excluding a potentially important variable can also hinder the discovery of useful segments. It is therefore important to have a structured process for choosing which variables will be used to define segments and which will serve to profile segments. The following rules of thumb may be of help.

• In general, it can be counterproductive to mix demographic and attitudinal variables in the same segmentation.

• You should take steps to limit the number of variables included in the analysis. Commonly a handful of critical questions will form the backbone of your most useful solution.

• It is wise to consider questions where variation exists in the data. On their face, these highlight points of differentiation in the marketplace.

• Try and avoid including two or more questions that appear to serve the same analytic purpose.

Test the utility of the segmentation

Segmentation analysis will yield one or more possible solutions to evaluate and you will be called upon to decide which is most useful. Surprise! There is no simple formula for determining the ideal segmentation scheme. The key, rather, is to systematically examine the profile of each segment and build a business case in support of the ideal solution. In doing so, consider the following important questions.

• Can members of attractive segments be easily identified in the marketplace, or are they based only

on information that is easily collected via survey research but not readily available otherwise?

• Are one or more segments particularly attractive and/or lucrative? Conversely, are there one or two consumer groups that can be eliminated as attractive marketing prospects, or at least relegated to a low priority tier of attention?

• Are these segments based on variables readily available in the company database, so that we can (if desired) assign current customers to one or the other grouping?

As a rule of thumb, useful segments tend to incorporate 10 percent or more of the population. It is also possible, however, to find lucrative segments that are very small. In the end, your winning solution should focus attention on groupings that are easily reached, effective at identifying the most and least attractive targets, and based on information that can be used in the future to group consumers based on segment membership.

Apply your solution to the marketplace

If the overarching goal of segmentation research is to sort consumers into distinct and meaningful "types" for marketing purposes, then it follows that such studies should provide you with the means of finding these types moving forward. Classification models can be created that use a short list of variables to effectively determine segment membership. Armed with this tool, you can bridge the gap between marketing research and marketing action and - in the process - strengthen the argument for conducting such projects in the future.

You may use a classification model to place new customers into segments at sign-up, to sharpen customer acquisition efforts, or to track segment membership over time. Or, you may identify different applications for this model based on your clients' needs. Regardless, developing a classification model will help pro-

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mote the segmentation study within your organization, provide staying power for the hard-found results, and help demonstrate the practical benefits of market research to others in your organization.

Educate yourself to the various techniques available for finding segments

A number of segmentation techniques have developed over time, each with a unique way of finding segments. None of them can be thought of as the "best" approach, and you may find it useful to compare and contrast solutions from multiple methods. It is therefore helpful to have a broad understanding of the options available. These are described briefly below.

• Clustering techniques array respondents in multi-dimensional space, and then group them based on proximity. This family of techniques is clearly the most traditional form of segmentation analysis, and can be broadly divided into two types: hierarchical clustering (which provides a range of segment solutions from which to choose) and non-hierarchical or k-means clustering (where you specify the number of segments to be created).

• Latent class modeling (LCM) is the only technique that offers a strong statistical basis for segmenting data because, unlike other methods, it is model-based. Therefore its fit can be evaluated like other statistical methods such as regression. In simple terms, LCM works from the assumption that data sets, as a whole, consist of different distributions mixed together. It then proceeds to unmix them, in the process uncovering unique consumer segments.

• Self-organizing maps (SOMs) represent a neural network-based technique. In it, respondents are introduced one at a time to an initially blank map. As each record is presented to the map, the dominant patterns in the data are learned and segments are created.

• Tree-based algorithms such as CHAID are particularly useful when a target or dependent variable is available in the data. If, for example, the acceptance of a direct mail offer represents a desired outcome, a segmentation scheme can be derived that first identifies what distinguishes acceptors from non-acceptors. The data set can then be further split into segments within these umbrella categories - a process that can continue until an optimal number of segments are obtained.

There is much more detail available in the literature on each of these techniques. It is important to remember, however, that the success or failure of your segmentation effort will hinge primarily on the processes you have in place, not the technique selected. It is smart to know your analytic options, but even the most advanced technique will not prove effective without careful planning, questionnaire design, and variable selection.

Lead to success

Segmentation research involves many steps, and a host of choices along the way. Managing this process is never easy, but there are ways to ensure that your hard work will lead to success.

Involve your clients from the beginning, and clearly understand what they hope to gain from the research. Work with them to understand critical data needs, and craft an efficient questionnaire where all information gathered directly serves the purposes of asegmentation. Use profiling as a tool to find attractive targets in the marketplace, and to enable marketing action in a way that is consistent with the resources available to your organization. Give users a tool for classifying consumers into segments in a way that demonstrates the business impact of research. All the while remember that managing a successful segmentation project means providing your clients with a solution they can understand and act upon. | Q

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panel research

Heard the one about the diabetic alligator?

By Fred Phillips

The research firm that employed me from 1976-89 measured consumers' purchase behavior in the packaged goods and dry goods categories sold by the largest companies in the U.S. Our clients compared our purchase volume numbers to what they thought they had sold - and sometimes, to what they wanted to believe they had sold. When there was a discrepancy, they called on yours truly, the firm's hapless but not totally unprepared quality assurance director.

Discrepancy, thy name is coverage

Our Census-balanced consumer panels were weighted upward so we could give clients population estimates of sales volumes, penetrations, shares, repeat buying and so on. Because our sales volume estimates were readily compared to clients' factory shipment numbers, clients didn't hesitate to complain about any gap between the two. We called these complaints "coverage problems."

Coverage complaints were frequently a cover (excuse the pun) for price negotiations or demands for free analyses. However, our estimates were careful and usually extremely good, given the sample sizes clients were willing to pay for.

Dealing with coverage problems involved interesting travel and intriguing mysteries. Their solutions, as you will see, were of varied kinds.

It takes a little detective work to explain purchase volume discrepancies

Accounting mysteries

Some were not that mysterious. One client sold jewelry door to door, in those days when "housewife" was an acceptable and meaningful name for a customer segment. Their sales figures were consistently higher than our purchase figures, and they called us on the carpet for it. I flew to the client's New York headquarters, not having an answer in my pocket, but hoping that by talking with them I'd be enlightened. As they spoke, I thought about the sales process and the "conversations" that might ensue when one spouse says to the other, "Honey, look what I bought today!"

Editor's note: Fred Phillips is a research professor at Oregon Health & Science University, Beaverton, Ore., and a former market research executive. He can be reached at fphillips@admin.ogi.edu.

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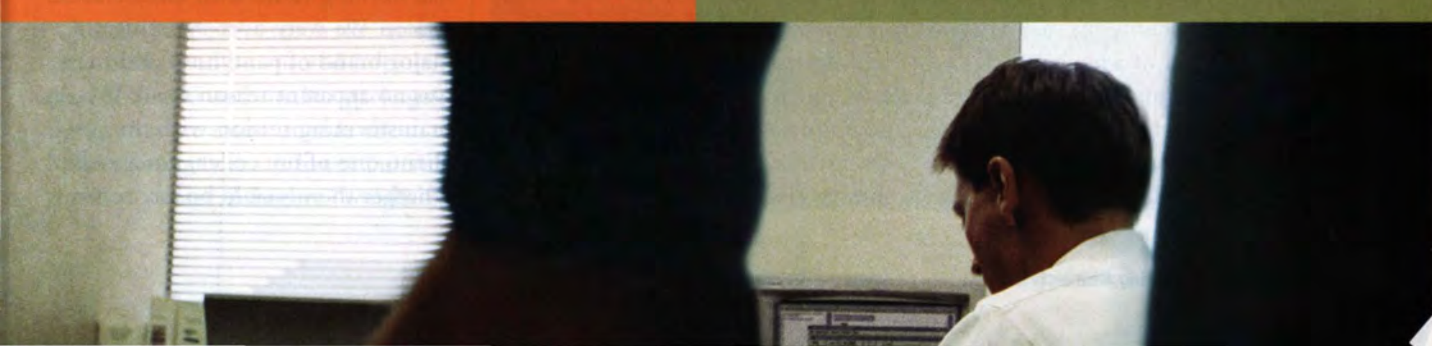


Snapping back from my reverie I blurted out, "Have you removed returned merchandise from the shipments you're comparing to our estimates?"

"We're not sure," was the response. "We'll check."

A few minutes later, an executive returned to the room and said, no, they had been using gross shipment numbers. A quick calculation showed that our estimates fit their returns-adjusted shipments more than reasonably well. I flew home.

Logistics mysteries

A food-industry client claimed to know how much of their product was on store shelves at any given moment. How did they know this? Their drivers, they told us, shelved the merchandise themselves, under agreements between the major supermarket chains and the manufacturer. It was these store volume numbers to which they compared our estimates. They claimed to notice a gap, and your QA director was mobilized.

I should say that my role model in coverage investigation was the protagonist of a story told by Colorado School of Mines Professor Gene Woolsey. In his story of missing orange juice, our protagonist begins his quest in the Florida warehouse where slurry (partially concentrated juice) is pumped into tanker trucks. The warehouse abuts a swamp, and he notices a number of dead alligators near the edge of the water. When one truck is sealed, our hero puts his own crimp in the seal, and follows the truck to a New York warehouse, where he finds the seal intact. The juice is drained into cans, and the cans into cases. Hiding in the warehouse during a shift change, he notices a few loading-dock workers putting cases of OJ into their cars. Punching his calculator under the light of a pocket flashlight, he determines that continued theft of this sort could amount only to a tiny fraction of his coverage problem. He follows the truck back to Florida, where its interior is steamed out and the process begun again.

Wait…steamed out? Spotting another returning deadhead tanker, he climbs inside and thrusts a ruler toward the interior wall, which proves to have a six-inch layer of concentrated orange juice adhering to it. Now, what's the formula for the volume between two cylinders? The trusty calculator shows that this is the answer to the coverage problem: a steam machine is dumping thousands of gallons of sugary orange concentrate into the swamp. Our hero gets his employer to fund an autopsy on one of the alligators, which proves to have died of diabetes.

With Woolsey's inspiring example in mind, and spotting one of my own client's trucks tooling down a Texas highway, what could I do but follow it? It left the highway and entered a Safeway parking lot. I watched the driver dolly a load of goods into the back door of the supermarket, and I planted myself near the interior door between the back and front sections of the store. The driver never appeared. I waited, waited longer, then looked outside to see him driving the truck away.

I mentioned this to the client, who replied, "Oh, I forgot to tell you, Safeway doesn't let our drivers shelve the goods."

I said, "Safeway is only the largest supermarket chain in the country (as it was then), and you forgot to tell me this?!"

The matter more or less ended there, demonstrating that this "coverage problem" had more to do with the client's need to posture than with actual concern about the estimates. However, solving coverage problems can involve having to know a lot about the physical distribution of the product. (Not only logistics and channel behavior, but how much end-user product goes to dormitories, school cafeterias, restaurants, hotels, prisons, military messes, cruise ships, government warehouses, fraternal organizations, foreign sales and foreign aid, and other destinations that are not U.S. households.) It's also true that with a nationally distributed brand, shrinkage (the minor theft, loss and damage that occurs during distribution - not what happens to Seinfeld's friend George Costanza) is rarely material to a coverage gap.

Sample composition mysteries

We received a call from a client that made pancake syrup. We were, the client accused, suddenly and drastically over-covering syrup shipments, by as much as 100 percent.

I checked the consumer panel purchase database for the time period in question. A fairly low sample penetration of pancake syrup for the period; lots of people buy it, but not very frequently. That meant a smaller current buying sample size and hence potentially bigger sampling variation. And one sample family in Mississippi seemed to be varying big time; they were buying a lot of syrup.

Our panel relations manager phoned them. They lived on a large ranch in Mississippi, they told us. Why so much pancake syrup? A few times a week, after morning chores, they invited all the ranch hands to the house for a big pancake breakfast! We expected our sample families to be as hospitable as anyone else, but this was ridiculous. The panel relations manager asked whether the family would mind being excused from further panel duties - to which they replied, "Sure, hon, fine." - and syrup market estimates fell back in line with shipments.

Trademark mysteries

Another instance of over-coverage had nothing to do with sample aberrations. We were over-covering a major brand of pantyhose, and there was no apparent reason for it. In a brainstorming session with the client, one of my colleagues asked whether there would be any reason that panel members would not be identifying the brand correctly. "Well, now that you mention it," the client allowed, "we have some legal proceedings underway against an Asian company that's making a look-alike knock-off." We could not see their lawyer's discovery files, but the client later said estimated sales of the Asian substitute neatly filled the coverage gap.

Data entry mysteries

In an old but instructive story, an assertive customer is poking through a bin of smallish frozen turkeys. "Don't these things get any bigger?" he complains. "No," the butcher replies, "They're dead."

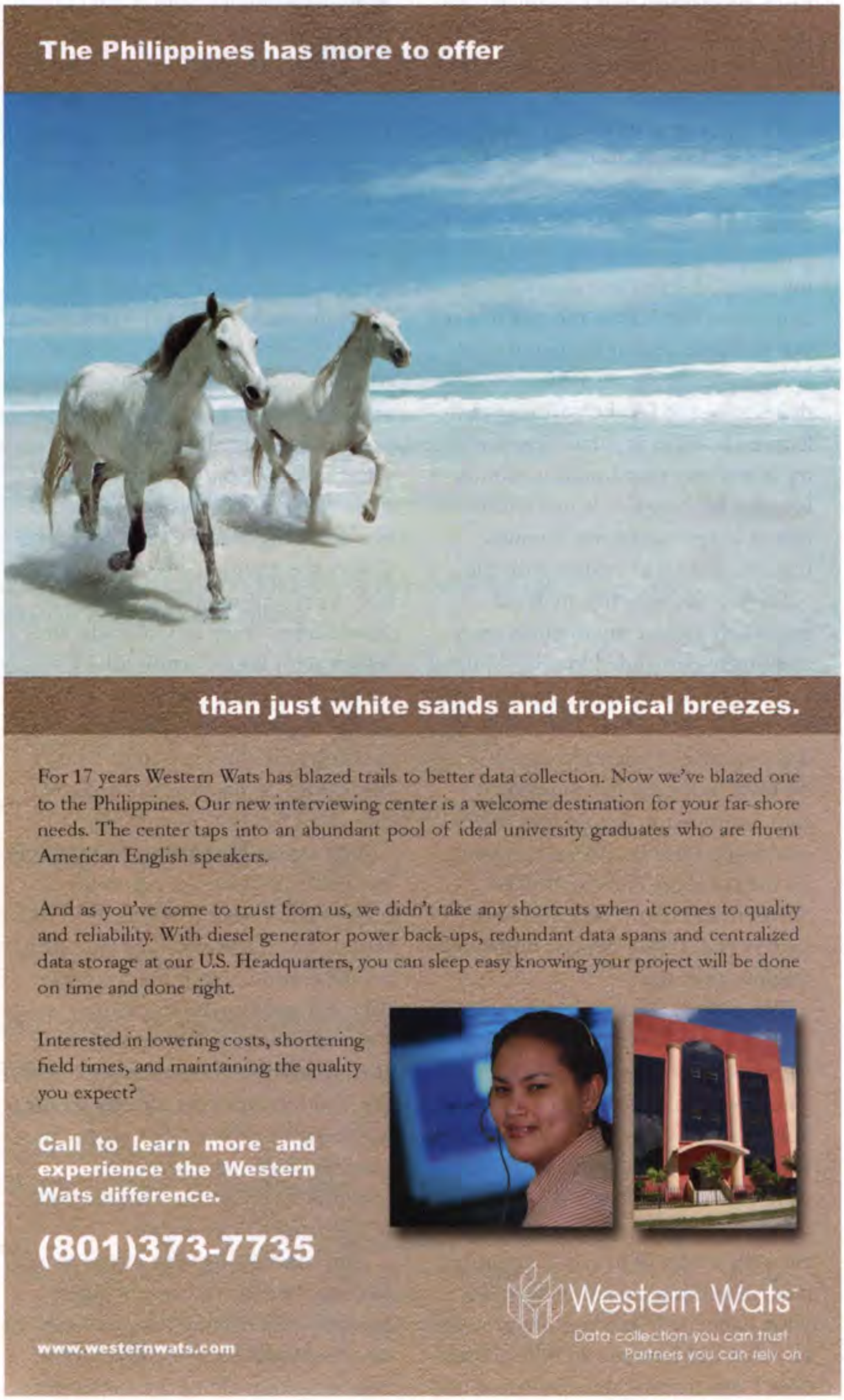
I frankly don't know why three bytes were allocated for the weight field in our database's frozen turkey records; did we expect turkeys to get that much bigger? A question arose in a month that was not November - meaning that few turkeys were purchased, and small sample variations had a big impact on reported volumes. When we discovered that a key operator had typed "270" pounds instead of "027" for one purchased turkey, that was the end of that particular over-coverage problem.

Math, statistics, and client relations mysteries

When coverage stays at a constant level, say 85 percent of client shipments, the gap doesn't affect the measurement of the trends which greatly concern clients. If sales volume increases 10 percent from one quarter to the next, the panel trend accurately reflects the shipment trend. Similarly, goods take time to travel along the distribution chain. A regular lag between panel volumes and shipment volumes is easily detected and corrected.

Items that do not reach the home are less likely to be entered in panel diaries. Snacks and smaller packages, things that are eaten outside the home, generally mean lower but still steady coverage. A higher "weighting factor" for snack foods is helpful and easily accepted by clients.

Other events can make coverage anything but constant, regular and steady. A wholesaler or retailer who is expecting a price increase will buy ahead as much as his cash allows. However, no one likes to keep cash tied up in inventory, so store promotions proliferate. They are attempts to reduce inventories. Much of marketing is a three-way game among consumers, retailers and wholesalers, each trying to get the others to carry the inventories. Retailers also execute manufacturers' promotions. If the promotion works, consumer sales increase. The retailer must order enough stock in time to cover the expected demand. This introduces irregularities into the distribution lag. You can imagine the impact on



coverage.

One client, a major snack manufacturer, had been increasing prices steadily, to the point where its products were expensive relative to other brands. They had also begun to promote much more intensively than in the past. Small wonder that coverage was destabilized. This was an important account, and an assistant and I worked full time for two weeks to devise a mathematical correction that transparently captured all the known price, promotion and lag effects. The model succeeded in bringing panel numbers and shipment numbers back into synch.

At the critical meeting, an executive of the client company argued with my new numbers. I knew (and I think he knew I knew) that he had no scientific grounds for criticizing my method. Even worse, one of his employees had leaked the fact that it was the time of year for brand managers' bonuses! This executive's objective was not to fix the coverage problem in the most accurate way, but to fix it in a way that would maximize his people's bonuses. It was within his power to terminate our account, though, and I had to deal with him.

During the meeting, he tried repeatedly to tear my method apart, and finally demanded loudly, "What if I still don't believe your numbers are any good?" Naïvely irritated that he had twisted the scientific question for his own (not even his company's) gain, I injudiciously told him that we could step outside and settle it there. To the surprise of all, he backed down, mumbling, "Well, you have to understand, I even doubt numbers my mother gives me."

We arranged to provide the client with two concurrent market assessments: "uncorrected" and "corrected." They eventually decided to purchase only the "uncorrected" reports, which, with no technical footnotes, were easier to understand.

I do not recommend violence, or even the threat of it, as a negotiating tactic. Thinking back, I believe this is what happened: standing my ground on what had become an ethical question, I was helping the client save face by not placing the ethical issue explicitly on the table. I was fortunate to have the support of an ethical top management at the research firm. We reported our best take on what the market was doing, and never distorted estimates to suit a client's wish to look good. I could admire the executive's desire to take care of his people, but could not let that affect our reputation for unbiased reporting.

Trading area mysteries

A premium brand of packaged meats was sold only in a four-state area, and the client paid only for consumer data from those four states. We consistently under-covered sales, and the client complained.

"Your brand is pretty well-known," we ventured during a meeting.

"Well, yes, of course it is." How could a client say otherwise?

"Here is a map of your trading area and the surrounding states. Lots of roads in and out of the four-state area, and quite a few big population centers nearby but outside the area. Are you thinking what we're thinking?"

As it happened, this client's neighbor was a big fan of Coors beer when Coors was a regional brand available only in the far west. The neighbor would often drive to Colorado and return with his car trunk full of Coors. Our client was more than ready to believe that consumers were crossing state lines just to buy his meats, and doing so in the volume described by the coverage gap.

"We can easily test this by sampling our panel members in adjoining states. Here's what it will cost. In the future, you can buy nationwide data, or just continue with the four-state data and guesstimate the 'export' sales. After all, as you've shown us, you already know how much you're selling. You buy our data for our detailed numbers on penetrations, shares, per-purchase volumes, promotion response and purchase frequencies - not for total sales numbers."

This solution had the virtue of feeding the client's sense of worth (people were driving long distances to buy his product!) while also further educating him about the use of our data. He continued with the four-state data for a while, and then moved to full reporting when the brand went national.

Third-party sources

In some cases, coverage questions stemmed from clients comparing our reports to another data source: their own shipments or store deliveries, or reports from a third party. More to the point, it was a comparison of our estimates to what the client thought we should have reported. These other sources naturally had their own measurement problems. We had to mention the latter gently; attacking a client's credibility is not wise, even when he is attacking ours.

A client's first thought was always that undercoverage resulted from panel under-reporting. This was often true (though after 50 years in business, our company had a good handle on its magnitude). Panel households with other concerns or less free time - new-baby households, households with both spouses working outside the home; young, single-male households - do tend to neglect their purchase diaries more than others. Different product categories, and categories mentioned in different positions in the diary also correlated with different levels of under-reporting.

Our sample balance, and hence the basic weighting factors, were based on the U.S. Census, which is conducted every 10 years. Government estimates of intercensal populations are based on its Current Population Survey, which itself is sample-based and subject to measurement error.

So coverage problems were often real; the real ones could nearly always be corrected by math modeling; some irreducible uncertainty always remained; and much useful marketing analysis could be done with our data regardless of the coverage level.

As these stories show, though, coverage complaints could also mask a variety of human problems. A coverage complaint was often simply the client's way of saying, "I don't think you have been paying much attention to me lately." | Q

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Defending against private-label

Getting the right answer from cost reduction research

By Randy Brooks, Bob Kushner and Aileen Beatty

A brief review of the trade press over the past five years or so turns up article after article and reference after reference spotlighting the growth of private-label offerings at the expense of national brands. A brief summary of the number, tone and content can be seen from the following:

• A Google search of the Internet for all references to "private label" turns up 1,140,000 hits.

• The number of categories with a private-label presence is growing. According to ACNielsen, since 1997 the percentage of categories with a private-label presence has grown from 69 percent to currently 75 percent.[1]

• Private-label items are taking share from manufacturer brands. During the 1990s, sales of store-brand products in supermarkets increased from approximately 13.5 percent of store sales to nearly 16 percent.[2]

• Private-label share in numerous consumer product categories is substantial and growing. The price differential during the time spanning 2002/2003 is very significant as the table shows.[3]

	Worldwide PL Share	PL Growth	PL Price vs. Manufacturer Brands
Paper/Plastics	29 percent	3 percent	-30 percent
Refrigerated Food	28 percent	5 percent	-18 percent
Frozen Food	28 percent	4 percent	-20 percent
Shelf-Stable Food	17 percent	6 percent	-30 percent
Non-Alcoholic Bev	11 percent	5 percent	-33 percent
Snack/confections	8 percent	4 percent	-29 percent
Personal Care	4 percent	6 percent	-45 percent

The growth of private-label products is frequently viewed as a threat to brands, leading some pundits to ask: are brands dead? At the same time retailers are viewed as increasingly powerful, with slotting allowances and a management focus on trade relations at the top of the agenda at most CPG manufacturers more often than brand management and advertising. In addition, national brand manufacturers (many of whom manufacture private-label products)

Editor's note: Randy Brooks is president, Bob Kushner is research consultant, and Aileen Beatty is research consultant, at Directions Research, Inc., Cincinnati. They can be reached at 513-651-2990.

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are under significant pressure from retailers to reduce the costs of their branded offerings to support "lower everyday price" positions or provide extensive levels of trade dealing/price promotions.

A study sponsored by the Private Label Marketing Association conducted in September 2000 claimed that approximately seven of 10 U.S. supermarket consumers consider the quality of private-label products to be the same or better than national brands.[4]

How did we get to this juncture? How is it that many times branded products do not appear to offer adequately higher levels of quality to support the price differential that exists? But more importantly, how can CPG firms effectively defend themselves from this strong competitor?

Cost reduction research

Product testing has been an intensive activity at CPG firms for the past 50 years. Tests have always been done for a wide variety of reasons including: new product concept/usage, flavor line extension, product improvements, and cost reductions.

In the past 10 years or so the frequency of cost reduction tests has grown significantly. The appeal of this strategy is obvious. A cost reduction program can immediately put money on the bottom line. In addition, a lower cost of production can support more aggressive pricing, trade dealing and support for the brand. The cost reduction strategy is of course: "Reduce the cost of a key brand to save millions of dollars, but not jeopardize the brand's health. A reduced-cost product that is invisible to consumers could be a home run for the firm."

The idea of intentionally degrading powerful brands is clearly not risk-free nor lacking in controversy. Indicative of the degree of discomfort such initiatives have created, many firms now label cost reduction projects with politically correct names such as: cost containment, margin enhancement, efficiency, squeeze.

Our firm has been called upon to conduct tests of many product offerings - both our clients' offerings and a wide array of competitive products across most major consumer products categories. A database of these tests called Navigator has been created to enable a cross-category/method analysis of results.

Design decisions made in cost reduction cases can entail huge risks to the health of key brands in a firm's portfolio. We have analyzed the Navigator database to see if we could use data to assist in the design of cost reduction tests that are safer - that is to say, more sensitive to subtle differences that might exist between the current formulation and the cost-reduced version. In a number of areas we have uncovered findings that, if used, would add a degree of confidence that the cost-reduced version is, if it passes the test, unlikely to erode consumer satisfaction with the new, less costly version.

Cost reduction test designs

When beginning a major cost-reduction initiative, decisions must be made that can have a profound effect on the sensitivity of the design, including:

- Blind or branded - Should the product shown to respondents have any identifying labels or logos?
- Test environment - What is the physical setting in which respondents will evaluate the product?
- User qualifications - What type of respondent do you want evaluating your new product?
- Sensitivity of design - How sensitive do you want the design to be to detecting changes in respondent opinion?
- Decision rule - What amount of difference in ratings between the

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original and new product do you consider acceptable?

Blind or branded

Consider the large amount of information that is given to a consumer when a branded test is conducted:

• The brand's image in terms of past marketing and advertising, any positioning and perception of who uses the brand.

• The perception of price and, more importantly, the perceived value.

• Experience with the brand itself (both good and bad) by the respondent.

• The product performance in terms of its overall quality, durability and reliability.

The Navigator database includes nearly a dozen pairs of tests where alternative formulations were tested both blind and branded. In virtually every case, the degree of difference noticed by consumers was substantially less when the brand name was present.

The argument made for branded testing is that the equity of the brand is an inseparable part of the product, so shouldn't it be considered? While true, the inescapable conclusion is that subtle damage can be done to the product if the test is only done branded. A test conducted in such a way is less sensitive and less likely to identify a difference when one exists. One option is to conduct both a blind and a branded cell when conducting the test. The blind cell will help to examine the pure product effect while the branded cell will help to determine the ability of the brand name to withstand the change.

Test environment

The primary venues for product testing are in-home and CLT (central location test). In-home tests entail providing the respondents a sample of the product to use at their home while CLTs involve recruiting respondents to visit a central testing facility to evaluate the products.

Both have advantages given certain research objectives. Central location tests are, generally, the more preferred method for cost-reduction as the respondents are more able to focus on subtle product-to-product differences due to the temporary removal of everyday life distractions.

Central location tests can simulate the home-use experience through asking the respondent to use the product in situations and realistic tasks that mimic those experienced at home. Important information can also be observed during a CLT such as how a respondent opens, prepares and dishes a normal serving, all points in the product-use process that can be affected by cost-reduction.

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consideration of CLTs for cost-reduction research. Many times, CLTs provide a lower cost and quicker turnaround while providing better control of the test by ensuring a consistent test environment.

Despite the advantages presented for cost-reduction, CLTs do not work well for all categories. Some products (many personal care products for example) simply must be tested in-home to obtain realistic reactions from the respondents.

User qualifications

Different user groups will likely have different perceptions of the new product. Light category users will be less sensitive to changes than heavy category users. Heavy users of your brand will likely have different perceptions of the new product than light users. Given this, the analysis of cost reduction research data should involve an investigation of user group differences.

Sensitivity of design

By definition, the change to be tested in most cost reduction research is not very noticeable (the objective usually is that the difference is not noticeable at all!). However, the test design should be adequately sensitive to detect if there is any shift in product satisfaction.

Many designs are used in cost reduction research projects, the most basic being the monadic design (one cell of respondents sees the current product and another cell sees the test product). This is not very sensitive, as a respondent is exposed to only one product variant. The use of a sequential monadic design allows the detection of product changes as the respondent sees both the current and test product. This has the benefit of allowing a built-in point of reference to evaluate the products.

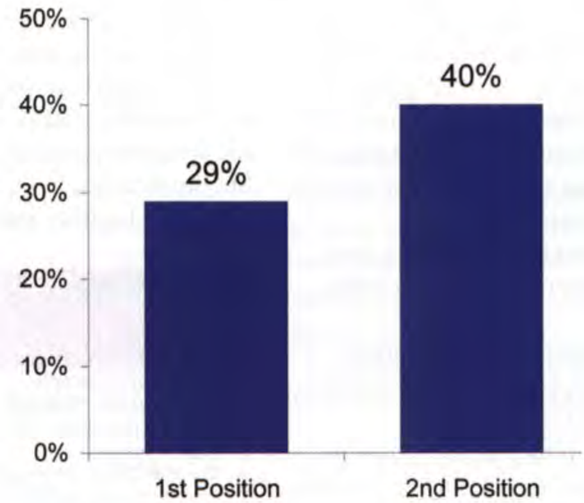
A sequential monadic design also allows for more sensitive statistical testing. A matched group provides greater sensitivity by accounting for the respondent-to-respondent portion of the overall variance. Some commonly used tests that do this are the matched-groups t-test or repeated measures analysis of variance (for more than two products).

Another analytical benefit of a sequential monadic test involves the analysis of the first/second position results. An evaluation of 109 paired sequential tests in the Navigator database reveals the number of significant differences between products is greater in second position than in first (see Figure 1). In other words, an evaluation performed within the context of a previous product allows for greater sensitivity.

Decision rule

Occasionally, marketers attempt to

Figure 1



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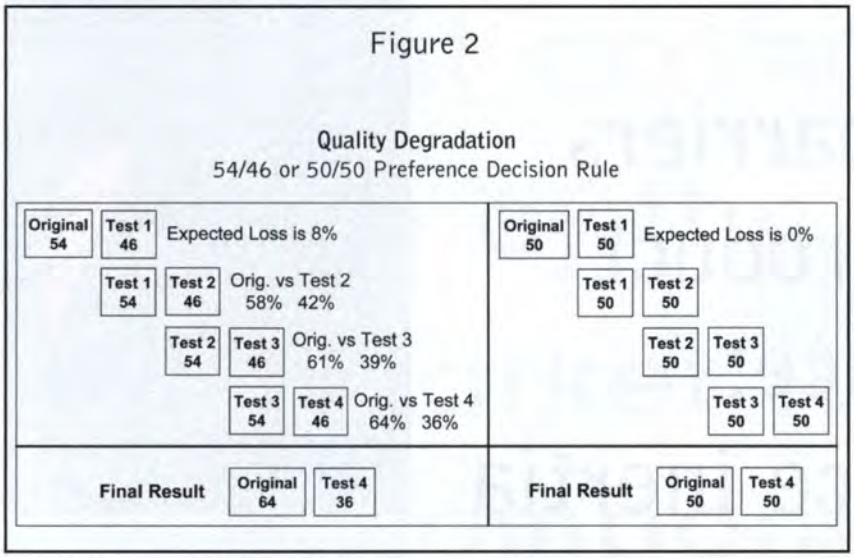

Figure 2

duplicate a successful cost reduction program to further decrease product costs. While on the surface this sounds like an effective plan, this course has a serious flaw: the repeated use of a decision rule that allows a potentially inferior product to eventually replace the original.

A decision rule typically used in cost reduction research is, "Adopt the margin-enhanced product only if it is statistically at parity (could be below but not much), or it is equal to/directionally ahead of the current."

Figure 2 demonstrates that if an 8 percent difference in product preference is acceptable for the first test, this translates into a maximum of 92 percent likely preferring the Test 2 variant. Applying the 54/46 decision rule means the Test 2 variant is actually different from the original by a 42 percent to 58 percent margin. If this continues, after four waves, the Test 4 variant is actually inferior to the original product by a 36 percent to 64 percent margin.

This subtle decay in the product (referred to as a "stair-step to disaster") could become noticeable over time and be perceived as a slow degradation of product quality. To avoid this, comparable ratings to the original can be accurately maintained if a decision rule of 50 percent/50 percent is kept throughout the process, thus not allowing seemingly small differences to accumulate.

Extreme care

Private-label products have a growing impact and are likely to continue to exert pressure on the sales and vitality of branded products in many categories. When manufacturers look to cost reductions as a means of competing with private-label offerings, testing must be done with extreme care and a focus on sensitivity, i.e., a central-location, blind-product, and sequential monadic design. The research should be conducted to insure that the quality of the brand is not undermined due to the use of methods that could mask the impact on consumer satisfaction of the cost-optimized formulation. | Q

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new product research

Hidden barriers to new product acceptance: preference inertia

By Donna Wydra and
Bill MacElroy

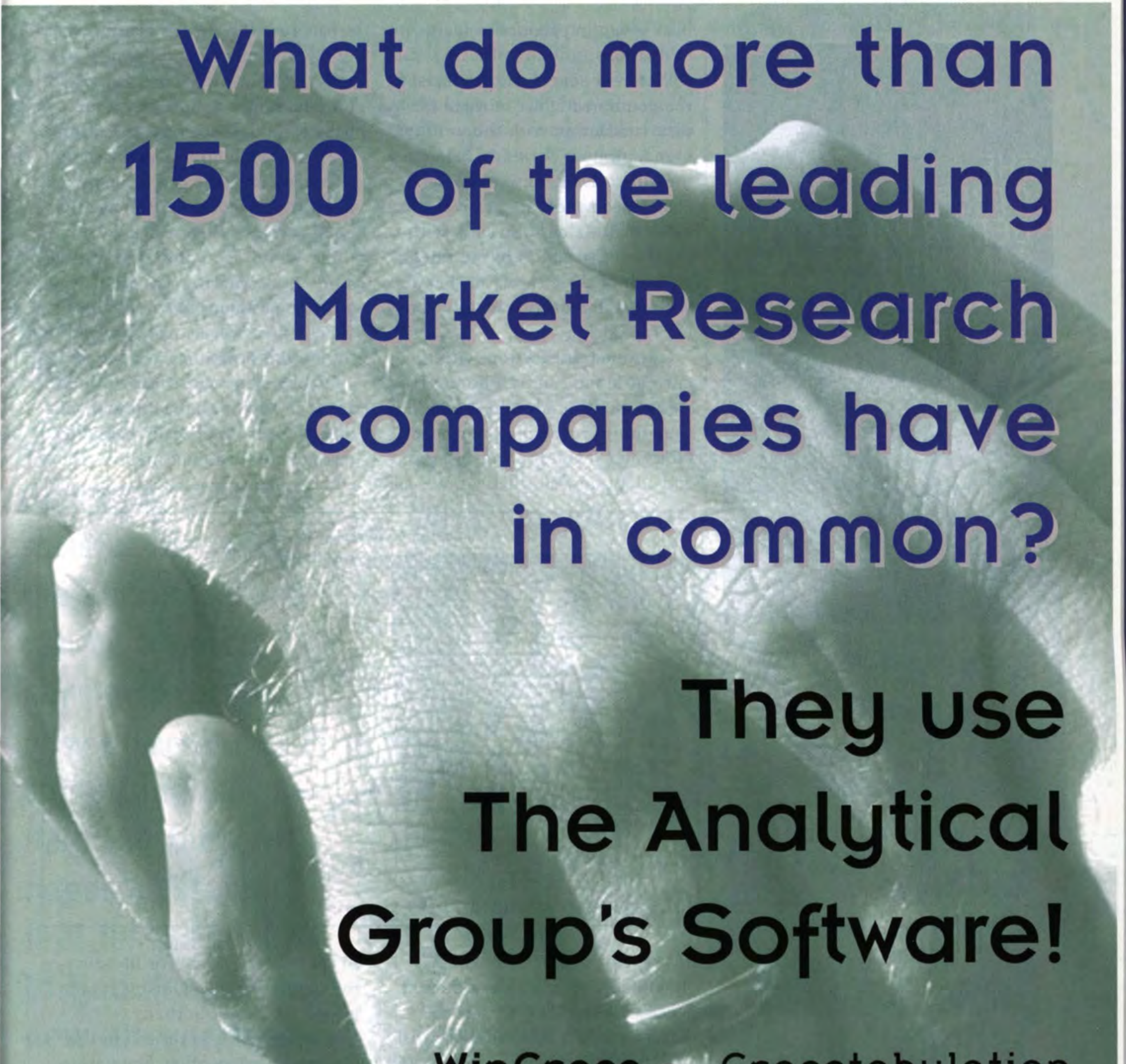
How many of us have been involved in working on a new product concept that didn't live up to expectations? Certainly, if you've been at it for a while, you have come across at least one example where the research predicted a big win but the launch didn't generate the predicted enthusiasm with customers. Even as the tools for assessing the price/feature/brand trade-offs have become more sophisticated, we still hear many clients reporting (at conferences and in case studies) that their conjoint and demand modeling techniques didn't accurately predict a new product's acceptance. In one case presented recently, a research director shared the horror story of having a multi-round series of discrete choice testing predict one outcome only to have sales reach a mere 12 percent of the predicted results.

Is it that our research tools are just too crude for predicting the success of radically new products? Over time, we have looked deeply into the results and have found that the conclusions aren't necessarily wrong, they're just predicting a time period several years out. Of course, competent researchers always use the standard disclaimers that such analyses assume perfect knowledge among customers and fully developed distribution to emphasize the need for a "ramp-up" period. But even when these are factored in, the poorer-than-predicted initial results are still not fully explained.

So what is going on here? What other, hidden barriers or missing components are at work? The answer, we believe, lies in a concept borrowed from academic research on consumer couponing. People who have studied the factors that induce consumers to take advantage of coupons for new products found that to be successful in initiating a trial use, consumers must be "deal prone." This concept of deal proneness identifies a number of factors that must pre-exist before a coupon activates a consumer response.

In studying the concept of deal proneness, we have discovered a widely applicable concept, that to one degree or another, acts to blunt the enthusiasm for new products entering an established market space. This phenomenon is called preference inertia. Preference inertia, in simple terms, is the degree to which the philosophy of "the devil you know is better than the devil you don't know" prevents the target customer population from trying new things. We have found that this resistance to change is extremely potent and can blunt sales by up to 40 percent, regardless of the rational feed-

Editor's note: Donna Wydra is vice president-consumer product practice for Socratic Technologies, Inc., a San Francisco research firm. She can be reached at donna.wydra@sotech.com. Bill MacElroy is president of Socratic Technologies, Inc. He can be reached at bill.macelroy@sotech.com.



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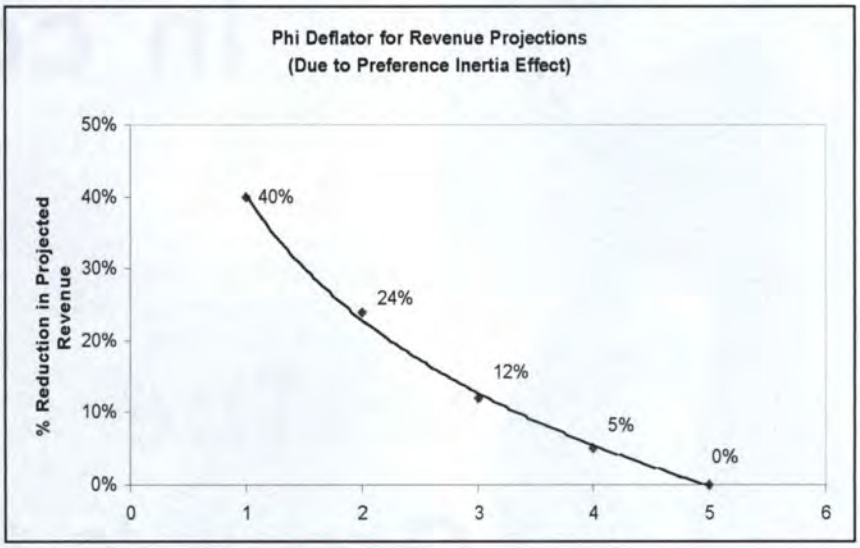
back given in product concept evaluations.

Preference inertia is produced by the combined effect of three factors: satisfaction with the brand/product currently being used; perceived risk in making a change; and the level of involvement that the customer has with purchasing products in the category. Each of these three sub-barriers will be different for various product categories.

Customer satisfaction with the current brand can be a potent barrier to trying a new alternative. If something is meeting their needs, customers feel less urgency to find and adopt new alternatives. We call this type of satisfaction barrier "micro-loyalty" because it doesn't necessarily last long. Unless the current product continues to satisfy at sufficient rates, the customer will be tempted to try new alternatives and the preference inertia due to this factor may be overcome.

Perceived risk of making a change can also be a powerful factor in preventing trial of a new product. One example of a product category where risk is particularly high is motor oil. People tend to be loyal to the same primary brand for most of their lives, and it is often the brand their fathers used. Here the risk is embodied in the fear that using a cheap or even different type of oil can hurt the car engine which, in turn, could entail major repair costs. To further exemplify, it is easy to understand why new parents might not want to take a risk on switching the brand/type of baby food or diaper rash cream they use, while just several years later they may not perceive any risk in changing brands of pre-sweetened cereal or sliced cheese for their school-aged kids. Risk can be a potent barrier to trial, particularly if the product plays a role in some expensive, critical and/or urgent life situation.

Involvement with a category is another way of asking "how much does the customer really care?" If trying a new product involves time, education, practice and/or changes to the way the work- or life-environment is arranged, many people would rather not bother. Involvement is also related to the innate awareness of change within a category. If the customer isn't actively scanning the market looking for a new solution, odds are that the initial message announcing a new alternative is falling on deaf ears. This barrier is most prominent in categories where the product or service is shopped infrequently or in those for which the purpose of the product is considered mundane, such as bleach or baking soda.



The practical application of the preference inertia effect is to deflate the estimates of product take rates over some initial period of time. As one might expect, preference inertia is not permanent and decays over time. The precise level of decay cannot be completely measured up front because it is affected by both changing customer needs and the level of spending to promote trial. But what we can do is estimate the "unadulterated" level of resistance in the first year or so of the product's lifecycle.

In finance, the application of the preference inertia effect is to deflate the net present value of the cash flow in early years from the introduction of new products (by reducing revenue projections). This

Customer satisfaction with the current brand can be a potent barrier to trying a new alternative. If something is meeting their needs, customers feel less urgency to find and adopt new alternatives.

deflator (which we call the Phi deflator) is applied most heavily in the first year, and diminishes over time. A model for the level of Phi deflation that we have used in categories with high levels of preference inertia is shown in the graph and begins at a 40 percent level (anticipated volume in Year 1 is only 60 percent of the predicted long-run take rate) and reduces to 0 percent by Year 5. Where preference inertia is less potent, the level of effect and its duration can be much lower.

This concept of a demand deflator can also help marketing to rationalize the findings from choice-based and trade-off analytical techniques which, as previously mentioned, can overstate the initial take rates by a wide margin. If we assume that the levels of relative utility generated by our conjoint and configurator analyses are correct, but simply need to be deflated in the early periods due to varying levels of preference inertia, then the findings are more useful and realistic.

The level of preference inertia effect differs by category and the customers that make up the target audience for the products and services. We recommend taking measurements in conjunction with product volume measurements and calibrating the category results for use in future product introduction planning. | Q

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Build the reconnaissance principle into research design

Making research actionable under tough situations

By Brian F. Blake and Rod Antilla

"We want actionable results!" demand executives sponsoring market research projects. Quite rightly they want research that helps them decide what actions to take to reach their objectives. As a result, a number of useful principles or guidelines have been proposed by seasoned researchers as ways to enhance a study's actionability. These ideas have focused on a project's ability to help the executives make the right decision. Based on our 40-plus years of combined experience, though, we feel that too little attention has been paid to the other side of the coin, the role of the research in executing the right decision.

We think of these execution strategies as the reconnaissance principle. For research to result in action, the researcher needs to work with the manager (client, sponsor) to detect any obstacles within the company that can stand in the way of an objective review of the data. If roadblocks appear likely, we suggest the researcher work with the manager to devise a procedure to overcome the problems.

More specifically, some previous suggestions point out that actionability requires that the research address the real issues. In the classic 1985 paper "Backward Market Research" in the *Harvard Business Review*, Alan Andreasen noted that researchers must first consider the particular marketing decisions to be made and what alternative choices are possible. Then from this understanding the researcher should work backward to design the sample, the questionnaire, etc. The bottom line is that researchers must know what the results of the study will be used for before they can know how to design the research correctly.

Other suggestions note the importance of ensuring that the right people are involved from the initial phase of the project. For example, in the article "6 Steps During Initiation Critical to Efficacy" in the January 20, 2003 issue of *Marketing News*, Karole Friemann flags the need to select the right people for the research team. These appropriate personnel include both those who actually make the pertinent decisions and those who execute the chosen actions.

Still a third guideline is to insist on the study's reporting the results in clear, exciting style. A good example is Martin Horn's comment in an article in the Fall 2002 issue of the *Association for Consumer Research*

Editor's note: Brian F. Blake is a senior consultant to Action Based Research, Akron, Ohio, and is director of the consumer industrial research program at Cleveland State University. He can be reached at brianblake@csuohio.edu. Rod Antilla is president of Action Based Research. He can be reached at rantilla@actionbased.com.

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News, "Research with Legs." He instructs researchers to focus the report around critical insights and to create an interesting, tightly woven story that the audience will avidly follow.

Though clearly valuable in their own right, these suggestions need to go further. Let us illustrate the reconnaissance principle with an all-too-frequent scenario, one that is particularly challenging for market researchers.

The situation

An external research vendor (the "researcher") is called in by a product manager at a consumer electronics firm to do a consumer survey to determine the demand for the various features of a home theater product. The manager is being pressed by the sales staff to develop a new product that is easy to set up, low in price and maintenance-free. The technical staff, though, insists that consumers want a product that has good sound, durability and flexible applications. The technical staffers believe that buyers will trade off a higher price and increased complexity of set-up and maintenance in order to get these benefits. The sales and the technical staffs are increasingly clashing.

What can the manager and the researcher do to ensure that the study is getting an objective review by staff and contribute to the company's action plans?

Implementing the reconnaissance principle

Try an eight-step process.

Step 1. To finalize the survey design the researcher works with the manager to identify pitfalls they may encounter when making known the results of the buyer survey. In our experience, these pitfalls often are:

- The staff whose anticipations are not supported by the survey can become vociferous critics of the survey methodologically (and maybe of the researcher!).
- The staff may become judgmental rather than analytical when reviewing study results. Instead of assessing why respondents feel the way they do, we may hear the staff say, "Those stupid respondents don't know what they are talking about!"
- The "unsupported" staff may fear suffering loss of face when it appears to others in the company that they do not have a feel for their market's preferences.

Step 2. Before collecting the data the researcher/manager convenes a task force composed of representatives of the numerous staff groups involved in making or in implementing decisions about the home entertainment center. The warring sales and technical staffs are not the only groups brought in. The task force then reviews the questionnaire and survey design. The goal is to have the task force commit to the procedures and so reduce the chances of later criticism of the study methodology.

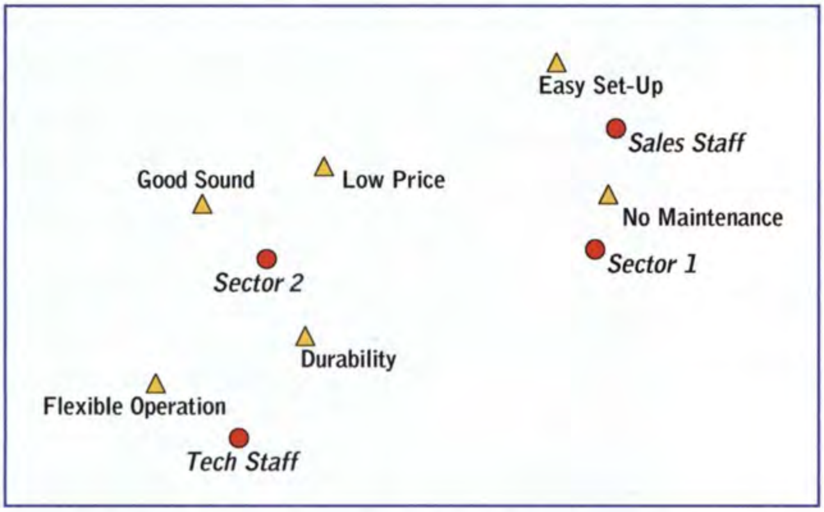
Step 3. The survey is launched. For illustrative purposes, let's say that customer preferences for a variety of product features are measured by a simple rating on a 10-point scale for the appeal of the feature.

Step 4. The researcher asks the staff groups (preferably the bulk of the members of these groups and not just the task force members) to answer the survey as they think typical buyers would answer. These projections would include the stated preferences of buyers for the product features.

Why do this? Three reasons. First, it provides the data for the mapping in Steps 5 and 6. Second, it encourages the staff to put themselves in the shoes of the consumers and pushes them to think analytically about buyer reactions. Finally, it helps the researcher focus the later presentation of the survey results on issues that are unanticipated by the staff rather than upon boringly detailed information the staff already knows.

It's critical that the researcher stress that staff projections will be grouped together and that no individual's projections will be made public. After all, the researcher would not want to make the staff feel defensive at this request for predictions!

PHASE 1 MAP



Step 5. The researcher analyzes the data for a three-phase presentation. The first phase (Step 6) will address internal differences of opinion and encourage all staff groups to see the study results as a company-wide win-win situation. Stage 7, the next presentation phase, will show the results of an integrated staff, and Step 8 is the "real" analysis, the one that would have been conducted if there had not been additional steps taken to overcome internal dissension.

To prepare for the first presentation phase (Step 6), the researcher calculates the predictions of each staff group. Next, respondents who match the predictions are culled from the data. For example, respondents are selected that match the predictions of the sales staff, i.e., respondents with strong preferences for ease of set-up, low price, and no maintenance. These selected respondents are grouped together, are labeled Sector 1, and their personal profiles are drawn from the data. In this case, Sector 1 is found to be mainly high-volume buyers of electronics who are current customers of the firm, middle-aged and affluent.

The same procedure is followed for the technical staff. Its matching respondent group, labeled Sector 2, is found to be mainly young, highly educated and professional. Then the matching respondent sectors and the sector profiles are computed for the other staff groups (e.g., communications, distribution).

A graphic display is then prepared to show the preference of each staff group and the matching sectors. While there are a wide variety of possible presentational formats, we like to use a preference map generat-

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PHASE 2 MAP

ed by multidimensional scaling. The SPSS and SAS statistical packages have handy programs to do this. A good non-technical description of this scaling approach is in the 1996 book by James Myers, *Segmentation and Positioning for Strategic Marketing Decisions*. Whatever presentational format is used, however, the display should show simply and clearly that the staff groups differ in their projections and that each staff group is "in tune" with consumers (at least with some of them).

The Phase 1 map shows the results for the technical and sales staffs. For simplicity, the projections and the matching sectors of the other staff groups are not shown.

In the preference map the locations of the points and the distances among them are mathematically estimated from the rating data by the multidimensional scaling routine. The red dot represents a group's ideal point, i.e., the type of product that the group considers most appealing. The closer a product feature (indicated by a yellow triangle) is to an ideal point, the more appealing that feature is to the group in question. In the Phase 1 Map, Sector 2 respondents prefer good sound and durability over easy set-up and no maintenance.

The closer together the ideal points are, the more do the groups' preferences agree. So the ideal points of Sector 1 respondents and sales staff projections of Sector 1 are fairly close together, showing that the preferences of Sector 1 respondents have been predicted by the sales staff. As anticipated, sales and technical staff projections are quite different.

Step 6. The research results are presented to the task force. The Phase 1 map demonstrates to the sales staff that, indeed, they are correct in feeling that a substantial number of consumers demand easy set-up, no maintenance, and low price. The map also shows that, indeed, the technical staff is correct in feeling that a substantial number of consumers want durability, good sound and flexible operations.

The researcher points out that the high-volume, middle-aged, affluent buyers (Sector 1) are grabbing the attention of the sales staff. The young professional market (Sector 2) is making its views known to the technical staff. The researcher concludes that the anticipations of the sales and technical staffs differ but are each realistic - and that certainly no group can be accused of being out of touch with the market!

Step 7. Next in the presentation the Phase 2 map displays the predictions of combined company staff, demonstrating that by integrating the views of all staff groups the company has its finger on the pulse of the market as a whole. The map reveals that the market as a whole wants good sound, low price and durability.

Step 8. The researcher commends all staffers for their sensitivity to market nuances, reiterates that the combined staff group has an accurate picture of the overall market demand, and then launches into the strategically meaningful analysis.

Actionable and appreciated

In summary, this case is a good example of the reconnaissance principle. The first seven steps render the groups more amenable to an open-minded analysis of survey data, less ready to defensively attack the study (and the researcher), and more prone to taking the actions shown in the Step 8 analysis to be warranted by market conditions.

So following the reconnaissance principle is not only a way of avoiding obstacles, it is also a form of team-building as well as a means of developing internal consensus around the company's strategic actions. Planning ahead to effectively address internal obstacles pays off by yielding research that is actionable…and appreciated. IQ

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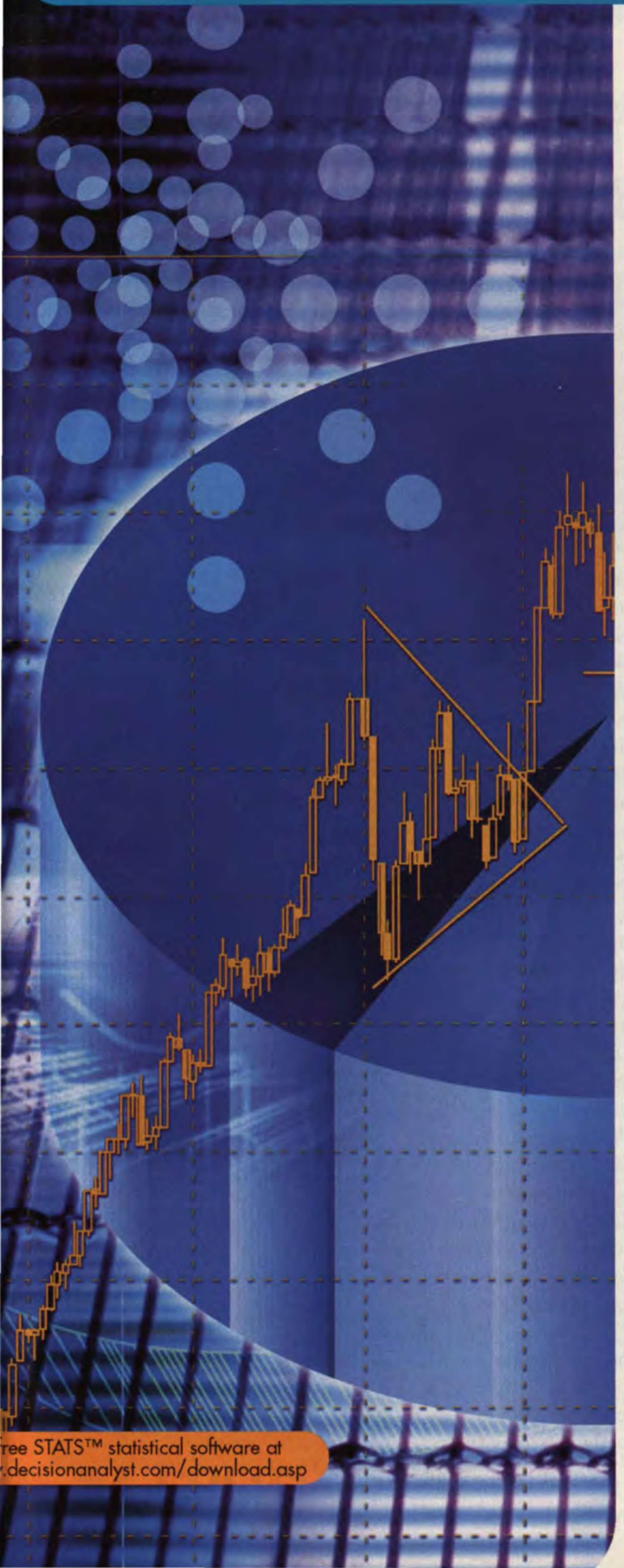

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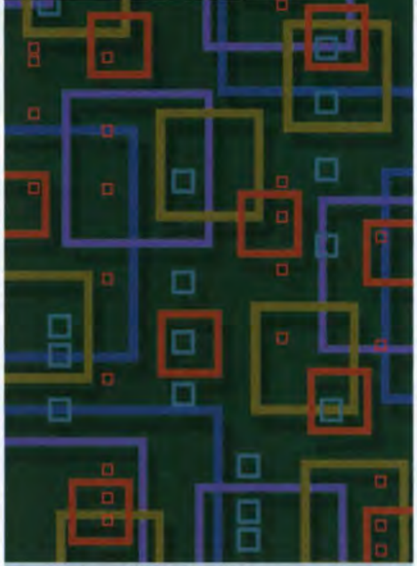

Useful data, maximized dollars

A practical approach to ensure research results are projectable to your target market

By Al Fitzgerald

The primary goal of any researcher embarking on a study is to produce projectable conclusions while spending the least amount of money possible to complete the project. To ensure these results, wise marketers are well aware of the connection between interviewing the correct respondent and yielding accurate results, and plan study recruitment carefully.

Conceptually, one might assume that a simple random sample of a population (let's say 18-65-year-old adults) would be the optimal approach to understand the demand for a consumer product. But this assumes that all adults have equal importance and this is not necessarily the case. For example, depending on the product, higher-income respondents may be much more likely to purchase. Therefore, researchers would be wise to oversample higher-income adults to better understand their purchasing behavior. Likewise, if we randomly sampled from a Dun & Bradstreet business list we would be equally as likely to reach small versus large firms. However, a large firm may buy 100 times as many units as a small firm - again the firms do not have equal importance in projecting demand to the market as a whole.

To give accurate weight to each type of respondent included in a study, the proper methodology is to conduct random stratified sampling. Implemented correctly, the use of this recruitment method is sure to produce useful data that maximizes interviewing dollars.

When to employ

The first factor to consider when implementing a random stratified sample is the total population to be considered in the study. This could be "U.S. businesses" or "U.S. consumers." While the ideal recruitment approach is to conduct simple random sampling (where anyone can qualify and results appear to be most obviously projectable), within most populations are specific subgroups that have disproportionate importance and are critical to understand.

More often than not, a product or service to be measured in a study is geared towards several specific portions of the population having varying degrees of rarity. It is then necessary to consider the subgroups on an individual basis, and determine exactly how they vary

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

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from the characteristics of the overall population.

In a business study, a hard-to-reach sub-group could be large companies, and in a consumer study this could mean individuals in a high-income bracket. A simple random sampling approach where any U.S. business is fair game for contact would yield very few large companies, just as a consumer study where all consumers are in the contact pool would garner scant high-income survey completes. So that timing and budgets are maximized, it becomes imperative to implement a strategic random stratified sampling method.

Without the ability to summarize the data that weighting provides, marketers are forced to look at very detailed sub-groups and conduct costly additional interviews - possibly missing the big picture in the process.

How to employ

Once a project has been commissioned and the objectives finalized, it is critical to clearly map exactly who needs to participate in the study in order for results to be valid. Thus, well before purchasing any necessary sample, you must achieve an understanding of the discerning characteristics of each quota group to be included.

Using the random stratified sampling method, quota groups, or strata, are established to ensure that a minimum number of completed surveys are obtained for each group of interest. Simple random sampling (i.e., each individual within the subgroup sample is chosen entirely by chance) is then conducted within each of these quota groups. Finally, the data is weighted so that the proportion of each quota group in the population is also reflected in the data. The results from the study are now projectable to the overall population.

Data weighting dangers

Employing weighting, where completes are given emphasis or weight according to the size of the group within the total population, allows researchers to complete reasonably priced research. Without the ability to summarize the data that weighting provides, marketers are forced to look at very detailed sub-groups and conduct costly additional interviews - possibly missing the big picture in the process.

While weighting allows results from the sample to become projectable to the population without paying for costly interviews among rare respondents, caution should always be exercised when using the approach. Many researchers overrely on weighting to compensate for difficult fielding. Care must be taken to not over-weight quota groups with small numbers of completes.

Case study

Suppose we are conducting a study of all businesses in the United States. Further, let's suppose that we are going to collect n=1,000 surveys. The random sampling approach would be to obtain an unbiased sample, and then collect the surveys from this sample. Since the sample is unbiased, each member of the population has an equal chance of also being in the sample. As a result, the distribution of the sample will be the same as that of the population.

The distribution for the population of businesses in the U.S. would look like the following:

- There are many companies with one to nine employees (84 percent).
- There are relatively much fewer companies with 10 to 99 employees (14 percent).
- And there are even fewer companies with 100 or more employees (2 percent).

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If the sample source is unbiased, then we would expect the 1,000 completed surveys from simple random sampling to yield 840 small companies, 140 medium companies and 20 large companies.

The results of this methodology would be completely valid and projectable to the population. However, if we were interested in looking at large companies separately, perhaps because they are more valuable than small or medium companies, we would only have 20 surveys upon which to base our conclusions. This would be insufficient. We could choose to collect more surveys until we have enough large companies, but we would need to collect a total of n=5,000 surveys in order to increase the number of large companies up to just 100. This is very inefficient from a data collection perspective. Fortunately, we can use the random stratified sampling methodology as a solution.

If we now apply random stratified sampling to the previous study, we would set quotas (strata) for small, medium and large companies. Since we will still collect 1,000 surveys, the quotas might be as shown in Table A.

Table A

Quota Group	Completed Interview
Small Companies (1 to 9 emps)	333
Medium Companies (10 to 99 emps)	333
Large Companies (100+ emps)	334

The sample must be handled differently than with random sampling. Rather than one sample with 20,000 businesses, we need to obtain a separate sample for each quota group. Each one should be an unbiased sample for each quota group (Table B).

Table B

Quota Group	Businesses in Sample
Small Companies (1 to 9 emps)	6,600
Medium Companies (10 to 99 emps)	6,600
Large Companies (100+ emps)	6,600

Simple random sampling is then conducted within each of the three quota groups. Specifically, businesses are randomly contacted within the small-company sample until the 333 small-company surveys are completed. The same is also done for medium and for large.

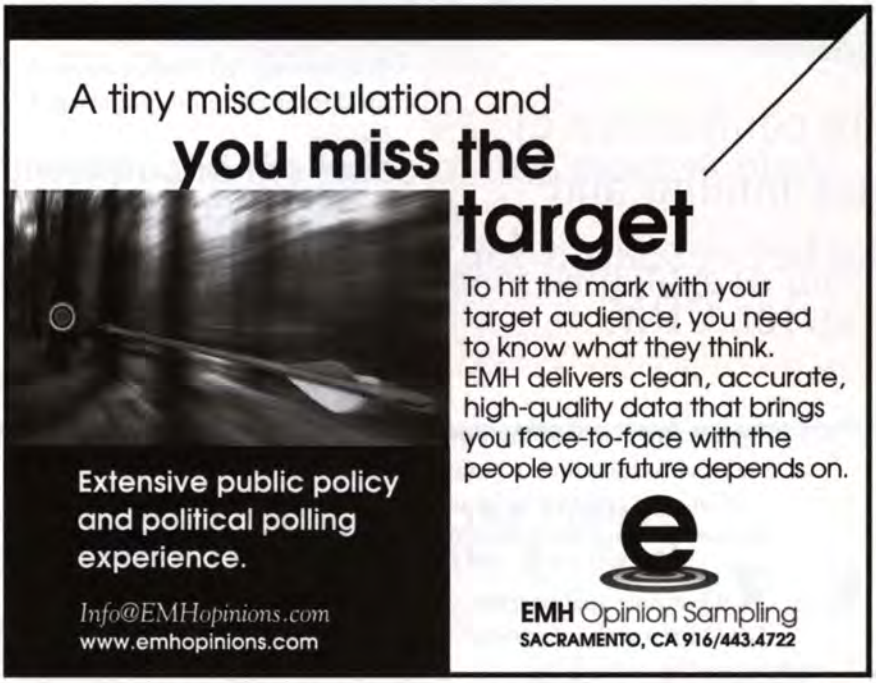
Now we have our 1,000 surveys, with 33.3 percent of them from small companies, 33.3 percent of them from medium companies, and 33.3 percent of them from large companies. However, the 1,000 surveys are NOT projectable to the U.S. business market. In the U.S. business market, the proportions of these company sizes are 84 percent:14 percent:2 percent, not 33.3 percent:33.3 percent:33.3 percent. The solution is that we weight the data so that the proportion of each quota group in the population is also reflected in the data.

Since small companies represent 33.3 percent of the data, but represent 84 percent of the market, we want to give them added weight in order to boost their impact from 33.3 percent up to 84 percent. Conversely, large companies represent 33.3 percent of the data, but only represent 2 percent of the market. We want to give them less weight in order to reduce their impact from 33.3 percent down to 2 percent.

With the data properly weighted, the results from the data are now projectable to the overall population. We now have the ability to analyze the data in total, as well as by company size.

It takes planning

Securing projectable results largely depends on thoroughly planning each stage of the study, including finding the correct people to interview and performing logical analysis on the collected data. No researcher wants to do fix-it work on the back end or spend their budget unnecessarily completing additional costly interviews. By implementing random stratified sampling, researchers gain just the opposite: the ability to produce projectable results, reduce the study's fielding price tag, and include hard-to-reach respondents in their sample. And with these dividends at stake, marketers won't mind a little extra time at the drawing board. | Q



Data mining/research

Two rivers

The confluence of data mining and market research for smarter CRM

By Kenneth Elliott, Richard Scionti and Mike Page

In most companies, the realms of customer behavior analysis and customer attitude analysis are worlds apart. They are like two swift flowing rivers that never meet. Behavioral analysis is typically the domain of business intelligence: tightly managed by IT and heavily focused on operational systems, data management, report servers, on-line analytical processing (OLAP) cube administration and data mining. While attitudinal analysis is the world of market research: owned by marketing, often outsourced to a market research agency, resulting in tabular reports and executive briefing documents.

However, true holistic customer analysis demands that these worlds come together. Customers both think and act. An understanding of how customers think can help explain and predict customer behavior. Conversely, customer behaviors can help explain and predict customer attitudes. Ideally, behaviors and attitudes would be analyzed simultaneously for deeper customer understanding.

For companies with large numbers of customers, data mining and market research are often employed to gain intelligence into customer behavior and attitudes respectively. Therefore, truly holistic customer analysis requires that these two disciplines be integrated. The rivers must converge. In this article, we will examine the issues surrounding the convergence of data mining and market research for deeper customer understanding.

- Are data mining and market research integrated within your company?
- Are you optimizing your investment in behavioral and attitudinal data for a complete picture of your customers' intentions and actions?
- Are you aware of the potential costs associated with redundant use of two disciplines to examine the same research question?
- Can you create a more efficient and accurate research operation by coordinating these disciplines for deeper customer understanding?
- What potential barriers will you face by trying to create a coordinated research operation?

Editor's note: Kenneth Elliott and Mike Page are partners in and co-founders of Cognicient, an Elmhurst, Ill., research firm. They can be reached at kelliott@cognicient.com and mpage@cognicient.com. Richard Scionti is vice president, survey and market research services, at SPSS Inc., Chicago, can be reached at rscionti@spss.com. Further information on the research on which this article is based can be found at www.cognicient.com.

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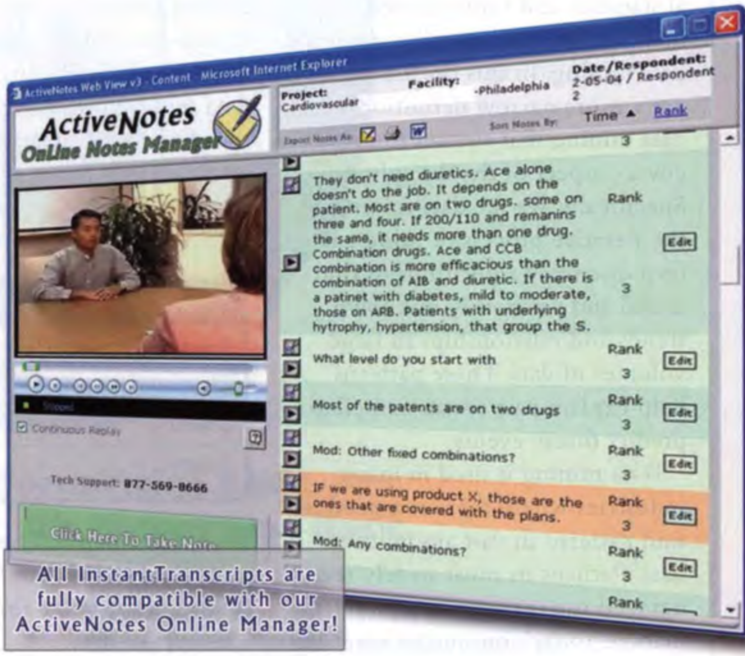

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What is data mining?

Let's begin our examination of the convergence of data mining and market research by exploring the basic principles and common uses of data mining for customer understanding today. (We will use the term "customer" to represent the identifiable customers that are known to an organization as well as anonymous "consumers" of the organization's goods and services.)

There are several definitions of data mining in use today. Broad definitions suggest that data mining is the exploration and analysis of large data sets. Under such definitions reporting, graphing, traditional statistics and sophisticated machine learning are all considered data mining. In this document we use a more narrow definition of data mining that stresses the discovery aspect of the discipline. Specifically, we see data mining as the iterative process of using pattern discovery algorithms to find useful and previously unknown trends and relationships in large volumes of data. These patterns help explain past events as well as predict future events.

Data mining is used in many industries where there is a need to find patterns in vast amounts of data. Perhaps its most widely recognized use is in the commercial market. Today's businesses are using data mining to identify patterns in customers' buying behavior; identify profitable customer segments; increase marketing return rates; prevent loss of valuable customers; estimate credit risk; identify fraudulent activity and much more.

The strength of data mining is in its ability to quickly sift through vast amounts of data to find patterns that are hidden and would otherwise be impossible to find. Data mining often uncovers unexpected patterns, which fosters new learning and insight.

According to a 2002 report from IDC, the data mining market is expected to grow at a CAGR of 13 percent to reach $823 million in 2006. This growth can be attributed to at least four key factors.

1. There are more information sources available today than ever and the amount of information is growing exponentially.

2. The explosive growth in the capacity of databases along with the shrinking cost of data storage has made it possible to acquire, store and manage more data than ever.

3. Using data mining techniques used to require complex programming skills. Today, there are powerful data mining tools on the market that are easy to use, making data mining more accessible to a broader audience. Many operational suite vendors are beginning to embed data mining into their applications.

4. The highly competitive market environment and growing customer options make customer intelligence more critical for business performance. This has created an increased appetite for rapidly finding knowledge from vast amounts of data.

Derived Clusters	Demographic Segments			
	Segment 1	Segment 2	Segment 3	Segment 4
Cluster 1	564	31	19	645
Cluster 2	69	950	92	22
Cluster 3	602	91	887	76

Support decision making

Within the context of customer intelligence, data mining and market research are often used to support decision making in the areas of customer acquisition, customer segmentation, customer retention and cross-selling. These applications are part of the field called analytical customer relationship management (A-CRM). As described below, the insights gained from these initiatives help organizations better manage their customer interactions, improve the level of customer service, and create richer, longer-lasting customer relationships.

• Customer segmentation. Understanding customer segments is critical to any customer-focused organization. Market research derives customer segments through surveys and demographic research. Data mining uses clustering techniques to find naturally occurring groups within the customer database. While each approach individually provides insight into basic customer groups, combining these approaches yields deeper insight still. A simple illustration of this can be seen in the table, which shows variances between purchased demographic segments and clusters that are derived by behavioral, transactional and individual characteristics. Segment 1 seems to include two distinct behavioral clusters. An understanding of Clusters 1 and 2 may suggest varied marketing strategies within Segment 1. Segment 2 and Cluster 2 seem to validate each other. Clusters 1 and 3 contain two different demographics. While these two groups seem to behave the same, demographics may provide insight into differing intentions. Combining data mining and market research techniques for customer segmentation can lead to refinement of segmentation strategies and to more accurate customer understanding.

• Customer acquisition. Data mining is used to help improve customer acquisition efforts by identifying the profile of potential buyers for a particular product or responders to a campaign. While these derived profiles can lead to improvements in marketing efforts, one can only infer the reasons these groups respond where others

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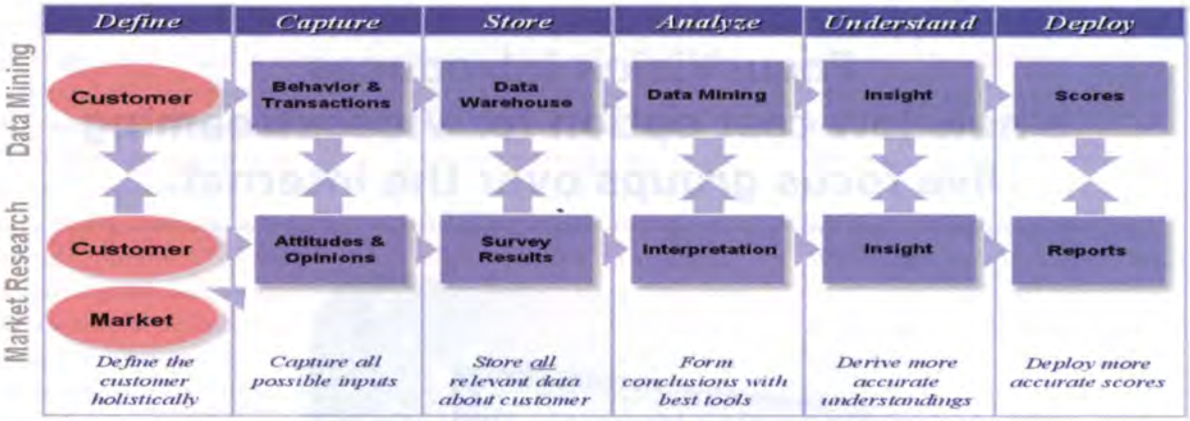
FIGURE 1: COMPARISON OF RESEARCH PROCESSES



do not. With market research one can survey customers to understand why they buy a particular product or respond to a specific campaign. Used together, data mining and market research can provide more actionable results in a more efficient manner. Specifically, data mining can identify customer segments to survey and provide hypotheses as to purchase intent and market research can narrow field work to a tighter segment and more focused research objective.

• Customer retention. Market research is well equipped to identify drivers of satisfaction and loyalty. By matching primary market research data to a customer data warehouse, data mining can be used to identify behavioral links between reported satisfaction and loyalty. Additionally, data mining can be used to validate a relationship between reported loyalty and actual churn behavior. Used together, data mining and market research can more accurately identify key drivers of customer loyalty and enable an active management of customer churn.

• Cross-selling. Data mining is often used to identify naturally occurring associations between products. Marketing managers use these associations to develop joint-marketing and cross-selling campaigns. However, many times product associations are not obvious or only occur within specific customer segments. Data mining is often ill-equipped to provide further insight into these patterns. In such circumstances, market research can be utilized to focus on what factors lead to these associations. This research can result in more effective cross-selling campaigns and product promotions.

Where should data mining and market research converge?

The convergence of data mining and market research can best be illustrated by examining the underlying research stages common to both disciplines. To this end, we define the underlying research processes as consisting of six distinct stages (Figure 1). These stages include:

• define where the customer is articulated;

• capture where information is collected;

• store where information is managed and maintained;

• analyze where information is examined;

• understand where insights and conclusions are drawn;

• deploy where insights are operationalized throughout the organization.

Data mining process

Data mining most commonly defines the customer as a set of trackable behaviors. This is due in large part to the fact that data mining requires large data sets. These are more often produced by operational systems than surveys. This means that the customer is defined as an acting entity with less input from intentions, attitudes or outside behaviors. Therefore, data mining focuses on capturing what is accessible via operational systems that interact with the customer.

These systems produce massive amounts of transactional data including purchases, customer service inquiries, Web visits, phone logs and more. The data is stored in large data warehouses. The analysis of this data requires highly scalable algorithms that churn through the data looking for common aggregate patterns. Customer understanding is derived from interpreting behavioral patterns. Intentions are then inferred from actions. Finally, the insights gained through data mining are represented in the form of models that can be used to score databases and real-time applications.

Market research process

Market research defines the customer as a thinking, affective entity where intentions and attitudes are more important than actions. Market research often defines the customer as a group within the general population. Being freed from the internal corporate database, market research is able to explore questions such as competitive product assessments, intentions to defect and general satisfaction. The data outputs are subjective

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comments and ratings. The data is often captured in the form of spreadsheets or text files and delivered in the form of written reports. The analysis of this data is a subjective summary of the results and interpretation of meaning across the responses. Customer understanding is gained by linking the attitudes of general population segments to the assumed makeup of a client's existing customer base. Deployment of market research results occurs through presentations to decision makers.

Combining processes

Combining data mining and market research will require synergy at each stage of the research process. While the customer deserves to be seen as a thinking and acting entity, combining these disciplines provides the unique ability to analyze the gaps that are known to exist between espoused plans and practice. Thus data capture must expand to include all information, subjective and objective, intentions and actions. The storage of data must come together so that the analysis stage can leverage both. In addition, the analysis stage must leverage new processes that take advantage of the best of both disciplines, including empirical behavioral modeling and qualitative research methods. Finally, the deployment of insight, whether to human or machine, should take advantage of the knowledge gained from both data mining and market research. Only when a full perspective of the customer is available can holistic conclusions be drawn and the most accurate insight can be deployed. (For a more detailed examination of the convergence of data mining and market research practice, see *Convergent Research Patterns* [Kenning Research Inc., 2003].)

Why haven't data mining and market research converged?

Despite their shared fit within customer intelligence, their commonality of application, and their similarity of research stages, data mining and market research have still not converged into a unified research environment today. Systematic convergence has been hindered by several factors. Among the most challenging barriers to convergence are separations between data mining and market research with respect to organizational structure, culture and infrastructure.

Organizational separation

In most organizations today, data mining and market research operations are housed within different parts of the business. This physical separation hinders interaction and cooperation. Organizational separation also implies that two decision-makers, both tasked with customer intelligence, are operating under different strategies and objectives.

Cultural separation

The cultural separation between data mining and market research can be seen from the executive and field level. At the executive level, there tends to be a decision-making culture that is based more heavily on either internal analytics or market research. The comfort of decision makers toward one approach over the other perpetuates the separation of disciplines.

At the field level, there may exist an adversarial relationship between data miners and market researchers. This atmosphere of non-cooperation hinders the advancement of research.

"Anything where a person's identity is used isn't market research, it's spying... We [market researchers] are always at risk of getting a bad name from people who mistake market research and data mining, which is about finding out enough about people to sell them something."

— president of a market research society

"What we need is not market research, it's more transactional data. It is well known that past behavior is the best predictor of future behavior. Attitudinal research is weak at best."

— data mining expert

Infrastructure

Today, market research and data mining rely on separate internal infrastructures. Bringing these two disciplines together will require the integration of technologies that are not widely integrated today. Such technologies include data collection, data management, data storage, data analysis/reporting, and deployment. As well as general applications such as project management and knowledge management.

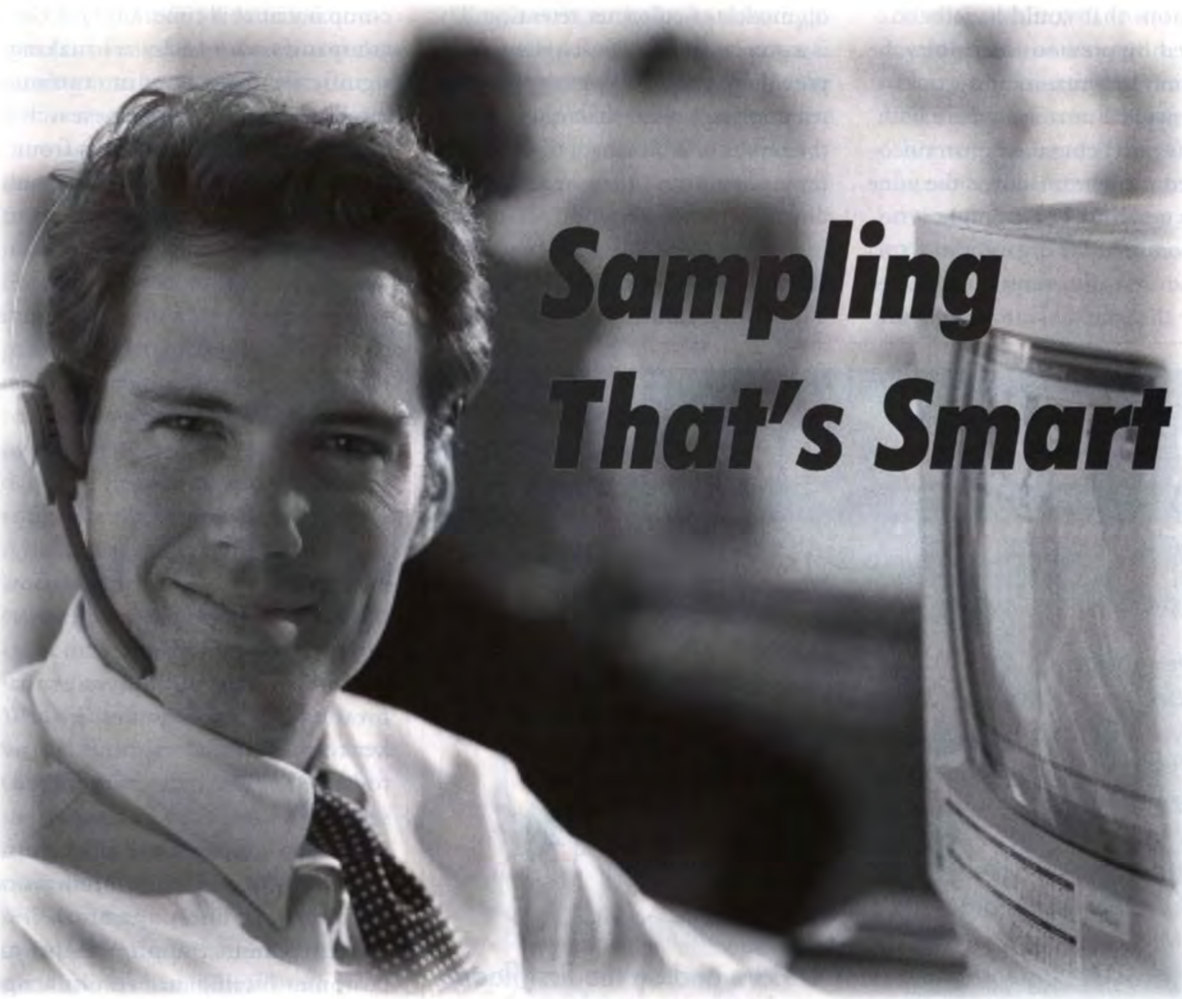
What are the benefits of converging data mining and market research?

Maintaining two separate disciplines for consumer research, data mining and market research leads to:

- non-optimized use of available data;
- non-optimized use of new learning;
- redundant treatment of similar research questions;
- sub-optimal conclusions drawn when one discipline is used where the other would have been more effective;
- ultimately, the potential for non-optimized intelligence at a higher cost.

Organizations that commission data mining and market research are often rich with data. In many cases, data mining and market research can be improved with the inclusion of data generated for use by the other discipline. Bringing these two research areas together can lead to the identification of available data, which can be leveraged to derive deeper, more accurate insight.

By not converging these disciplines there is the risk that knowledge gained from one research ini-



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tiative isn't shared with the other. This can lead to the formation of conclusions that could have been improved by previous learning.

Certainly, an organization would want to avoid a situation where both disciplines are being used in an uncoordinated manner to address the same research question. For example, it is not uncommon for organizations to commission market research agencies to study the issue of customer loyalty, while in another initiative they have commissioned data analysts to develop models of customer retention. This is a good example of each discipline providing a unique and valuable contribution to the research question. Yet, the results will be sub-optimized and more expensive if they are not coordinated.

Recommendations

The convergence of data mining and market research may not be the best strategic initiative for your company at this time. Only those companies who today are making a significant investment in customer intelligence and market research can expect significant gains from convergent research. If your company collects behavioral and attitudinal data on your customers, has numerous customers with whom you engage frequently, and is under competitive pressure to grow and maintain your customer base, consider the following recommendations.

• *Determine the need*

The first step toward the development of a convergent research environment at your organization is an internal assessment. Review the following questions with relevant individuals within your organization. Do you commission market research and data mining today? Are they being conducted separately? Are they being conducted to address similar business questions? Is customer intelligence critical for business operations? Can incremental improvements in customer intelligence result in significant advancements in business performance?

• *Test the readiness*

Examine your internal data mining and market research operations. Distribute this article and get their reaction. Assess the cultural readiness of your team to adopt a convergent research discipline.

Examine the organization structure that houses data mining and market research. Develop a chart that documents the relationships among those who are pivotal to the research process for each discipline. Identify the cultural and organizational barriers that separate these disciplines. Be sure to document the strengths and supporting relationships as well. Review the technologies each group utilizes to perform its research. Identify the overlap and differences in the required infrastructure. Determine

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if these information environments can be coordinated.

Then, identify all internal consumers of market research and data mining results. Interview these decision makers to understand how they use these streams of information. Ask them how they synthesize this information in their own minds, and what they desire from the research, and assess the potential business benefits from convergent knowledge. Also, identify all non-human deployment of research results, whether these are in the form of scores back into the database or recommendations to real-time operational systems. Assess the potential benefit of improving the accuracy of these scores, even by the smallest amount.

• *Start small*

While it is important to have a vision of what is possible and how to get there, take one successful step at a time. Pick a small pilot study to measure your internal readiness for the convergent research paradigm. This pilot should test the organizational, cultural and technological environments. It should also be designed to demonstrate the "lift" generated as a result of convergent knowledge compared with traditional research approaches alone.

• *Start strategic*

Due to the initial investment in the pilot, choose an application that has high strategic value. Or pick a tactical application that has the promise of high financial returns. Chances are, a successful pilot project will lead to the identification of a larger implementation of the approach. Proving the concept on a highly visible and strategic application will insure greater excitement and buy-in for further progress towards convergent research.

• *Find support*

All change, no matter how beneficial, is difficult. It will be easy to slide back into the old ways of doing things. Choose a consultant, under a limited and focused engagement, to help you through your internal assessment and to help design a pilot program. Make sure the consultant has experience in both data mining and market research toward improving customer intelligence.

• *Share your success*

Find a forum to share the results of your successful initiatives. Not only will this establish you and your organization as innovative and adaptive, it will foster the development of a supportive community of like-minded contemporaries who will challenge each other to grow and refine the discipline of convergent research. Start now and you can develop and maintain a convergent research practice as your competitive advantage. | Q

Survey Monitor

continued from page 8

the five-year period from 1999 to 2003. Sales increased to $19.6 billion in 2003, a 7.4 percent increase over the previous year.

"When it comes to getting dinner on the table in a hurry, our options have come a long way from frozen dinners of yore," says Don Montuori, acquisitions editor for Packaged Facts. "The food industry has been highly creative in packaging appetizing and time-saving foods that are quickly approaching a cooked-from-scratch quality." For more information visit www.packagedfacts.com.

Update on do-not-call list awareness

The Federal Trade Commission's National Do Not Call Registry has been remarkably successful. More than half of all adults (57 percent) say they have signed up and most of these people say they have either received no telemarketing calls since then (25 percent) or far less than before (53 percent). Only a few of those who have signed up report getting the same number (5 percent) or more (1 percent) telemarketing calls than before.

These are some of the results of a Harris Poll conducted online by Harris Interactive, Rochester, N.Y., with a nationwide sample of 3,378 adults who were surveyed between January 19 and 28, 2004.

Other interesting findings in this research include: the proportion of all adults who have heard of the Registry has increased from 71 percent last September to 91 percent; the proportion of all adults who claim to have signed up with the Registry has increased from 32 percent last September to 57 percent; over 90 percent of those who have signed up report receiving fewer telemarketing calls, including the 25 percent who say they have received none, 53 percent who have received some but far less and 14 percent who have received some but a little less than before.

Most people on the Registry (68 percent) do not know if survey research firms and pollsters are allowed to call numbers that have signed up for the Registry. Only a quarter (24 percent of those signed up) know that they are allowed to call because they were exempted from the "do not call" restrictions. A few people (8 percent of those who have signed up) mistakenly believe that pollsters are not allowed to call. Two in every five (41 percent) of those on the Registry report that they have been polled since signing up. For more information visit www.harrisinteractive.com.

Credit card mailings decline for second consecutive year

Though you probably couldn't tell based on the number of offers in your mailbox, annual credit card mail volume for 2003 decreased by 12 percent compared to volume in 2002, according to Chicago research firm Synovate. The findings, which were compiled using Synovate's Mail Monitor, showed that 4.29 billion credit card offers were received by U.S. households during 2003, down from 4.89 billion in 2002, while consumer response remained low at just 0.6 percent. The year-on-year drop follows a record 5.01 billion offers set for mail volume in 2001.

On average each month, 69 percent of U.S. households received 4.8 offers during 2003 vs. 75 percent of households receiving 5.1 offers during 2002. "During 2003 typical seasonal mailing patterns went out of the window," says Andrew Davidson, vice president of competitive tracking services for Synovate's Financial Services Practice. "90 percent of credit card direct mail comes from the 10 largest card issuers and in 2003 half of those issuers cut back, causing the overall decline in mail volume."

In 2003, an all-time record was set for personal bankruptcies and despite recent improvements to the economy, unemployment remains high. "Card issuers have reacted to this environment by mailing fewer low-introductory-rate offers and decreasing the frequency of mailings to lower-income households," says Davidson. "At the same time, we have seen a significant increase in offers promoting rewards and cash rebates as issuers seek new ways to stand out from the clutter and acquire customers that are less likely to switch."

U.S. households received 1.27 billion reward offers in 2003, up from 0.81 billion in 2002. Rebate card mail volume increased to 0.90 billion from 0.68 billion over the same time period. For more information visit www.synovate.com.

Report looks at furniture-buying process

Of total adults planning to purchase bedroom furniture, 31 percent indicated that lowest price was a determinant with their last furniture purchase versus 23 percent who said high quality was a major factor. And 31 percent of adults who indicated that highest quality was most important reported that they visited three stores prior to making their last furniture purchase of $500 or more, 4 percent more than the average adult. These are some of the findings from the Customer Focus 2004: Furniture study from Vertis, a Baltimore marketing services firm.

Other study findings include:

• 84 percent of Sunday newspaper readers who also plan to purchase living-room furniture in the next 12 months said they have read Sunday's advertising insert or circulars in the past seven days.

• 82 percent of Sunday newspaper readers who own their condominium, townhouse or house, and said they shopped at two furniture stores before making a purchase of $500 or more, read an ad insert in the Sunday paper in the last seven days.

• 85 percent of total adults surveyed said they read advertising inserts and 69 percent indicated that they have read them in the past seven days.

• Advertising inserts and circulars continue to be the medium that consumers turn to first when they are looking to make their purchase decisions. Thirty percent of total adults surveyed indicated that inserts are their first preference, as opposed to 18 percent who said they turn to ads on the page of a newspaper, and 15 percent who indicated that they turn to the Internet.

• 23 percent of total adults surveyed

said they plan on purchasing area rugs in the next 12 months, followed closely by bedding and floor coverings at 22 percent.

• Of those surveyed, 17 percent indicated that they will be purchasing bedroom furniture and 16 percent said they will purchase living-room furniture over the next year.

• Additionally, 30 percent of furniture shoppers surveyed reported that one to six months elapses between major bedroom furniture purchases of $500 or more - 10 percent more than the average adult.

• 26 percent of total adults surveyed said they wait 37 or more months between furniture purchases of $500 or more as compared to 17 percent of bedroom furniture purchasers.

• 53 percent of adults planning to purchase furniture are women, compared to 47 percent men.

• 27 percent of Generation Y (1977-1994) adults and 33 percent of Generation X (1965-1976) adults surveyed indicated that they will purchase bedroom furniture in the next 12 months. Conversely, only 11 percent of older Baby Boomers (1946-1955) reported that they will purchase bedroom furniture.

•52 percent of Generation Y renters plan to purchase living-room or bedroom furniture, compared to 36 percent of total renters. For more information visit www.vertisinc.com.

Consumers will sacrifice convenience, cash to skip TV commercials

New research from Menlo Park, Calif.-based Knowledge Networks/SRI shows that early adopters of home media technologies are willing to pay a significant price - in dollars and convenience - for the capability to bypass commercials in television programming; but many may not be willing to offer up information on their viewing habits as part of the bargain.

The findings come from two recent reports – All Things Digital and How People Use Interactive TV – published as part of The Home Technology Monitor, a service tracking consumers' ownership and use of media technologies. The data show that awareness of digital video recorders (such as TiVo) - which enable ad skipping at the push of a button - has risen from 56 percent in 2002 to 72 percent among early adopters.

Though 63 percent of these high-tech consumers say that watching commercials is a fair price to pay for TV programming, an even higher proportion (72 percent) do not think that DVR ad-skipping capabilities should be restricted or eliminated. This sentiment was stronger among younger respondents (86 percent of those ages 18 to 34) than older ones (66 percent of those 50 or older).

Early adopters also said - by a three to one margin (74 percent versus 22 percent) - that the ability to skip commercials is more important to them than being able to watch programs "on demand" (at the time most convenient to them).

About 5 percent of early adopters have a DVR, and 14 percent of non-owners say they would be "very interested" in paying $10 extra per month for a set-top box with a DVR built in.

Newer DVRs and digital set-top boxes have the capacity to capture users' viewing, pause, and replay data - information that can be collected by the service provider. Knowledge Networks research shows that 57 percent of those with advanced TV services agree with the statement, "No one should be able to find out any information about what I watch." Among these privacy-minded consumers, only 23 percent said they would be more likely to share their viewing information if they were offered incentives (such as discounts on their TV service). For more information visit www.knowledgenetworks.com.

Senior citizens lead Internet growth

New York-based Nielsen//NetRatings reports that senior citizens age 65 and older were the fastest-growing age group online, surging 25 percent year over year to 9.6 million Web surfers from home and work in October 2003. Additionally, within the senior citizen age group, Nielsen//NetRatings found that the number of female seniors online jumped 30 percent, while male seniors jumped 20 percent.

Since October 2002, senior citizens online grew from 7.6 million or 5.9 percent of the active Internet universe to 9.6 million surfers aged 65 plus, making up 7 percent of the active Internet universe in October 2003. The second-fastest-growing age group was Internet users 55-64, which jumped 15 percent from 13.6 million to 15.6 million surfers from home and work. The third-fastest-growing age group included those aged 18-24, jumping 13 percent from 9.3 million to 10.5 million surfers.

Nielsen//NetRatings found that in addition to outpacing senior males in audience growth, the rise in usage by female seniors was greater than the increase in usage by senior males. While male senior usage still dominates, female seniors increased their average Web pages viewed per month by 14 percent, whereas male seniors increased their pages viewed by 5 percent. Female seniors increased their average time spent online by 6 percent, spending nearly two more hours online, while male seniors increased their time online by 2 percent. While the number of sessions for female seniors increased by 2 percent, the number of sessions for male seniors decreased by 3 percent.

"As a whole, the Internet audience is continuing to become more representative of the general population," says Greg Bloom, senior Internet analyst, Nielsen//NetRatings. "Thanks to new technologies such as broadband and wireless, the bulk of the Internet's recent growth has been associated to higher levels of activity from experienced Web users. However, as we continue to track year-over-year trends, we observe significant upticks in the online presence of important groups such as seniors." For more information visit www.nielsen-netratings.com.

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1.2 million hotel rooms. The reports provide historical performance data spanning five years, incorporating occupancy, average daily rate (ADR), revenue per available room (revPAR), percentage change and 12-month moving averages. Provided in Excel format for convenience, the reports can be customized to suit specific requirements and ordered through a variety of means. For more information visit www.smithtravelresearch.com.

New facilities

Focus Plus has opened a new qualitative facility in New York City at 100 Fifth Avenue. It is adaptable to create environments for mock juries, living rooms, kids' rooms, auditoriums, boardrooms, classrooms, IDIs, usability labs and mock retail locations. It features a super-capacity room with seating for 50 and has T1 Internet LAN and wireless connectivity. For more information call John Markham at 800-340-8846 or visit www.focusplusny.com.

Western Wats, Orem, Utah, has opened an interviewing facility in Cebu, Philippines. The 30,000-square-foot facility is located in the Mactan economic district near Cebu's three major universities. The center is currently equipped with 200 Web-enabled W.I.R.E. stations and will grow to 300 stations over the next year to accommodate demand. W.I.R.E. (Wats Integrated Research Engine) is a proprietary enterprise system that allows data to be collected by telephone and stored in a central repository at Western Wats headquarters. The facility is also equipped with a diesel generator backup and redundant voice/data links to the U.S. to ensure reliability. The facility is managed by Chris Mangelson. For more information visit www.westernwats.com.

Communications Center, Inc. (CCI), a Washington, D.C., market research data collection firm, has completed work on an expanded CATI center in Lakeland, Fla. With CCI's CATI facility in Spokane, Wash., the opening of the new facility brings CCI's interviewing capacity to a total of 230 interviewing stations.

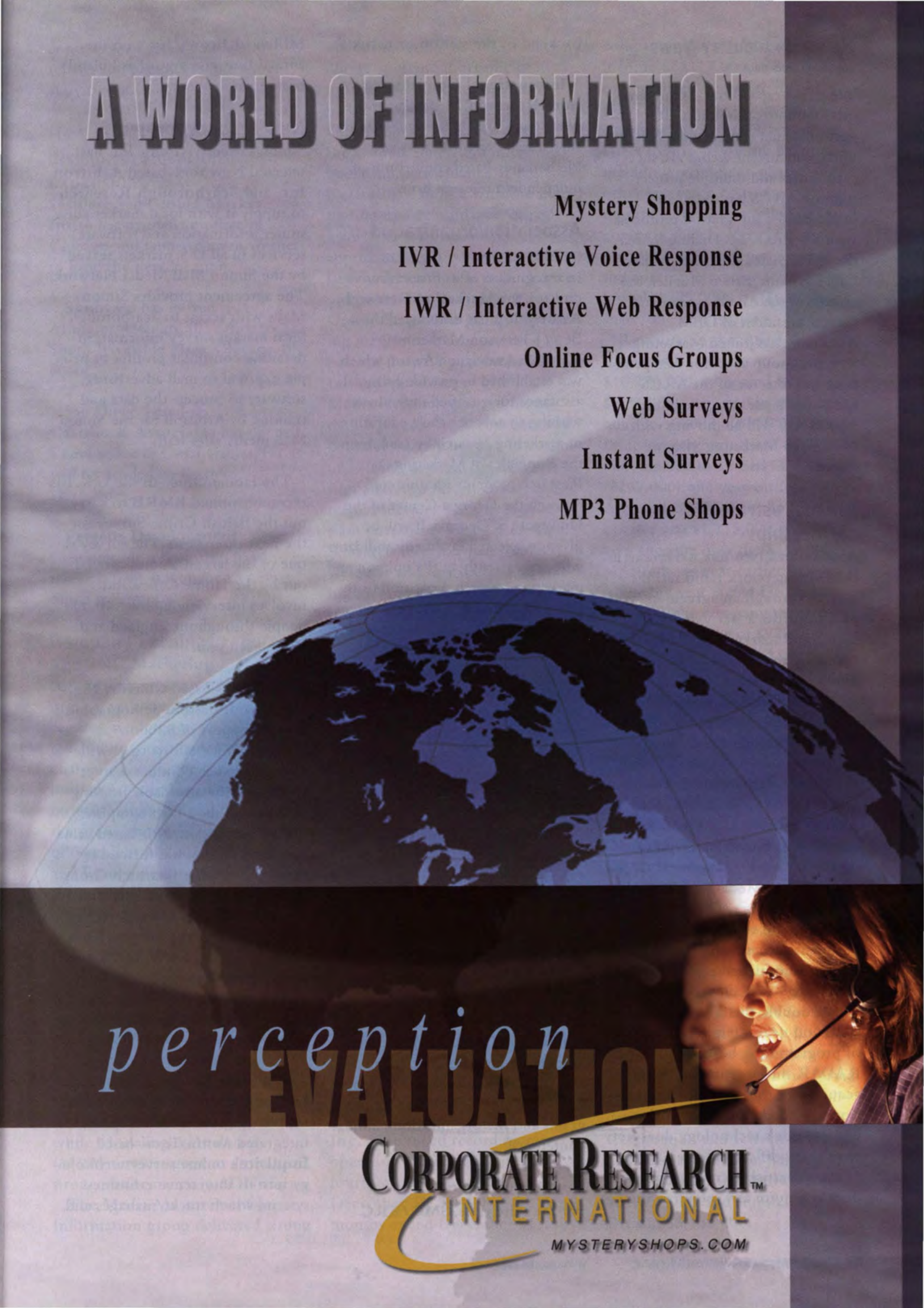
Briefly...

Eastern Research Services, Springfield, Pa., has opened Bilingual Research Services, an El Paso, Texas-based data collection firm. For more information visit www.easternresearch.com.

Doane Marketing Research, Inc., St. Louis, has launched a new shared-cost monthly tracking study. The 2004 U.S. Companion Animal Tracking Study obtains monthly data from a stratified sample of companion animal clinics and projects the doses and brand share of canine/feline vaccines as well as heartworm products. For more information contact David Tugend at 216-491-9515, ext. 211 or e-mail dtugend@doanemr.com.

Direct Feedback, a Pittsburgh research firm, is now offering focus group results to clients on DVD. The company has also added wireless Web access for clients.

The Consumer Network, Inc., Philadelphia, has released its Packaging Report Card 2004, a 53-page report on consumer perceptions of eight types of packaging (such as pouches, boxes, cans) in 50 product categories. For more information contact Mona Doyle or Charles Ebner at 215-235-2400.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integrated capabilities - simultaneous inbound/outbound IVR options, panel management/scheduling, concurrent Web/IVR survey capabilities and multiple project support. ARCS has tested and implemented integration protocols with the PRO-T-S Dialing System, the QTS Dialer and other research CATI systems. Bruce Mueller, the creator of the ARCS system and former president of DBM Associates, has joined Marketing Systems Group as senior vice president and director of the ARCS Division. In addition, the entire ARCS staff will be moving with Mueller to Marketing Systems Group.

Alliances/strategic partnerships

Arbitron Inc., New York, is enhancing its RADAR network radio ratings service through an agreement with **Mediaguide**, a Berwyn, Pa., media and marketing information company that monitors more than 2,300 local market radio and television stations nationwide. On April 1, Arbitron began using Mediaguide's broadcast monitoring technology to verify whether the radio commercials that were scheduled to be aired on affiliated stations of RADAR-rated networks were broadcast as indicated on the network commercial clearance reports. Mediaguide's technology provides real-time measurement and reporting of music performance and advertising execution. Adopting the Mediaguide technology will allow Arbitron to nearly double the sample of stations and nearly triple the number of programming hours that RADAR monitors to verify the accuracy of the clearance information provided by the networks. Mediaguide's technology does not require modification or encoding of the advertising creative, nor does it require any set-up at the backend of the station or network.

International Communications Research, Media, Pa., is the newest and only U.S. member of the Intersearch Network, a 10-year-old Netherlands-based consortium of independent research firms.

Association/organization news

In recognition of its first executive director, the **Marketing Research Association** has introduced the Betsy J. Peterson Marketing Research Association Award, which was established to provide financial assistance for qualified individuals wishing to enhance their education in marketing research by completing the Principles of Marketing Research program administered through the Georgia Center of the University of Georgia. It will be given to selected qualified candidates who are currently in the opinion and marketing research profession or to those interested in pursuing a career in the field. Selection is a two-part process. Applications for the Principles of Marketing Research program are reviewed first by the Georgia Center. Eligible candidates are then reviewed by the Marketing Research Association Award selection committee. For more information visit www.mra-net.org.

CASRO (the Council of American Survey Research Organizations) announced a 12 percent increase in membership in 2003, bringing it to record membership levels of 250 research companies and organizations. Full-service research company membership increased to 189 firms while associate member organizations now number 61. CASRO experienced a 10 percent increase in attendance in 2003 at CASRO-sponsored events, including CASRO University programs and the organization's annual conference.

Awards/rankings

For the third time, **SMG/KRC Millward Brown** has won the annual Impactor Award as Poland's best research agency.

New accounts/projects

Simon Property Group, Inc. has selected New York-based **Arbitron Inc.** and **Scarborough Research** to supply it with local market consumer information and software services in all U.S. markets served by the Simon Mall Media Network. The agreement provides Simon Malls with access to Scarborough's local market survey information detailing consumer profiles of people exposed to mall advertising, software to process the data and training by Arbitron for the Simon Mall media sales staff.

The Home Office in the U.K. has recommissioned **BMRB** to carry out the British Crime Survey for the next three years. The survey is one of the largest studies carried out by the Home Office and involves interviewing over 40,000 people throughout England and Wales each year.

San Diego-based **Claritas Inc.** will provide custom demographic data in support of Ribbon Demographics' efforts to provide tools needed to conduct market studies for the affordable housing industry. Ribbon Demographics, a unit of Livingston, N.J.-based Value Research Group, was formed by members of Value Research Group to develop and market specialized demographic data and reports.

American Cellars Wine Club has selected **WebSurveyor Corporation**, Herndon, Va., for its online customer satisfaction surveys.

First Service Networks, a Linthicum, Md.-based commercial facilities maintenance company, has integrated Austin, Texas-based **Inquisite**'s online survey technology into its interactive e-business system, which tracks, manages and controls the cost of emergency repairs and planned maintenance activities of its customers.

New companies/new divisions/relocations/ expansions

Seattle-based **Global Market Insite** has opened an office in Chicago and tapped Steven Werner to head the new location.

Synovate has moved its Arlington Heights, Ill., office to 222 South Riverside Plaza, Chicago, Ill., 60606.

San Diego-based research firm **Castillo & Associates** has opened a new office in Coral Gables, Fla. It will be headed by Patricio Hernandez.

Perseus Development Corporation, a Braintree, Mass., research firm, has opened a new office in Toronto.

Company earnings reports

The **VNU Marketing Information** group achieved solid organic revenue growth across all regions, while operating results (excluding a reorganization charge) on the same basis showed a limited growth due to investments in future growth. Total revenues of the group showed organic growth of 6 percent in 2003. The Americas and Europe performed in line with the announced guidance of 5 percent to 7 percent. ACNielsen's organic revenue growth amounted to 7 percent. During 2003, Marketing Information achieved revenue growth at constant currencies in all regions in which it operates. This performance was led by Retail Measurement services, which grew 7 percent. Consumer Panel and Customized Research services showed slower growth, while Modeling & Analytics (M&A) services grew as a result of strong performance in ACNielsen.

The Media Measurement & Information group delivered strong operating results in 2003, primarily due to substantial organic growth in total revenues and operating income from its largest business unit, Nielsen Media Research in the United States, and improved operating performance at NetRatings. In line with the 2003 trading update guidance, organic growth in total revenues was approximately 5 percent in 2003, largely driven by the performance of Nielsen Media Research in the United States. The group's operating margin rose to more than 21 percent from 18 percent in 2002. In the United States, Nielsen Media Research realized more than 9 percent higher revenues at constant currencies, due to continued strong demand for its television audience measurement and related services. Revenues at constant currencies for Nielsen Media Research International (NMRI) were flat and, as expected, operating income declined slightly due to competitive pressures and overall softness in the global advertising environment, which lowered demand for NMRI's advertising and television audience information. Results improved significantly at VNU's 65 percent-owned Internet measurement business, NetRatings. Organic revenues grew at a double-digit rate, due to improved renewal rates and selling prices across its clients base and growth from its various product and service offerings. Operating results improved as a result of higher revenue, greater operating efficiencies and a favorable comparison with 2002, when one-off charges totaling EUR 13 million were recorded related to restructuring measures and a settlement of patent litigation with Jupiter Media Metrix.

New York-based **FIND/SVP, Inc.** announced record increases in operating performance in the fourth quarter and year ended December 31, 2003. For the three months ended December 31, the company reported operating income of $117,000, as compared to a reported operating loss of ($207,000) in the comparable period of the prior year. After giving effect to non-recurring charges, including retirement-related and other severance costs, the company reported a net loss attributable to common shareholders of ($65,000), or $0.00 per share, in the quarter, as compared to a net loss of ($520,000), or ($0.05) per share, one year earlier.

Revenues in the quarter increased 91 percent to $10,236,000, compared to $5,349,000 reported in the fourth quarter of 2002. EBITDA for the three-month period was $479,000, as compared to an EBITDA loss of ($147,000) one year earlier. Adjusted EBITDA in the fourth quarter was $1,115,000, a 219 percent increase over the $349,000 reported one year earlier.

For the year ended December 31, 2003, the company reported operating income of $928,000, as compared to a reported operating loss of ($1,007,000) in 2002. After giving effect to non-recurring charges, including retirement-related and other severance costs, FIND/SVP reported net loss attributable to common shareholders of ($75,000), or ($0.01) per share, as compared to a net loss of ($1,124,000), or ($0.11) per share, for the prior year.

Revenues for the year increased 52 percent to $31,569,000, as compared to $20,828,000 in 2002. EBITDA for the year was $2,189,000, as compared to an EBITDA loss of ($383,000) in 2002. Adjusted EBITDA for the year ended December 31, 2003 was $2,779,000, as compared to $625,000 in 2002. On a pro forma basis, giving effect to the consolidation of Guideline Research Corporation and Teltech as if each had been acquired on January 1, 2003, revenues in 2003 were $37,200,000, and adjusted EBITDA was $3,155,000.

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2004

Telephone Facilities Directory

>>>

The 2004 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 720 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.

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

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2. **CATI** - No. of stations using computer-aided interviewing
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Robert E. Higginson, V.P./Client Relations
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Fax 602-997-5488
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John Muller, President
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Myra Balaban, Exec. Vice President
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Peter Apostol, Vice President
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Jim Petrillo, President
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19-8-19-19

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Alan Superfine, V.P/G.M.
60-60-60-60

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50-50-50-50

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Patrick Bartels, Vice President
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Dr. Anita Kantak, Principal
17-17-17-17

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Evonne Guinn, Manager
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Fax 818-780-0329
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www.calsurvey.com
Ken Gross, President
44-44-44-44

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

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

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65-65-65-65

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E-mail: info@garciaresearch.com
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Carlos Yanez, Project Director
47-48-48-48

Ted Heiman & Associates
California Qualitative Center
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Fax 818-598-2916
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Ted Heiman, Owner
25-0-19-19

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200-200-200-200
(See advertisement on p. 92)

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Ph. 818-989-1044
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E-mail: mhalberstam@isacorp.com
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Fax 661-726-9580
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Michael Halberstam, President
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20-0-20-20

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(See advertisement on p. 9)

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Jennifer Kerstner, President
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www.inquireresearch.com
Don Minchow, President
21-14-21-21

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106-24-106-0
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Ph. 404-261-8011 or 847-392-0800
Fax 404-261-5576
E-mail: lenox@midamr.com
www.midamr.com
Carrie Skinner
8-4-8-0

The Myers Group
2351 Henry Clower Blvd., Suite B
Snellville, GA 30078-3107
Ph. 770-978-3173 ext. 304
Fax 678-430-0113
E-mail: jlorber@themyersgroup.net
www.themyersgroup.net
Jeffrey Lorber, Sr. Operations Manager
46-46-46-46

Pioneer Marketing Research
3323 Chamblee - Dunwoody Rd.
Atlanta, GA 30341
Ph. 770-455-0114
Fax 770-458-8926
E-mail: jblumberg@pioneer.bz
www.pioneer.bz
Joe Blumberg, Exec. Vice President
32-32-32-32

Schlesinger Associates Atlanta, Inc.
The Palisades Building, Suite 950
5909 Peachtree Dunwoody
Atlanta, GA 30328
Ph. 770-396-8700
Fax 770-396-8753
E-mail: atlanta@schlesingerassociates.com
www.schlesingerassociates.com
Stephenie Gordon, Facility Director
20-0-20-20
(See advertisement on p. 9)

John Stolzberg Market Research
1800 Century Blvd., Suite 1000
Atlanta, GA 30345
Ph. 404-329-0954
Fax 404-329-1596
E-mail: stolzmr@aol.com
John Stolzberg, President
15-0-0-0

V & L Research & Consulting, Inc.
5295 Highway 78, Suite D324
Stone Mountain, GA 30087
Ph. 770-908-0003
Fax 770-908-0004
E-mail: vlresearch@mindspring.com
www.vlresearch.com
Dydra H. Virgil, Principal
20-12-12-12

Gainesville

Pioneer Marketing Research
86 Hwy. 53 W., Suite 210
Dawsonville, GA 30534
Ph. 706-265-9052
Fax 706-265-9054
E-mail: btyner@pioneer.bz
www.pioneer.bz
Bill Tyner, President
32-32-32-32

Hawaii

Honolulu

Market Trends Pacific, Inc.
1136 Union Mall
Honolulu, HI 96813
Ph. 808-532-0733
Fax 808-532-0744
E-mail: wanda@markettrendspacific.com
www.markettrendspacific.com
Wanda L. Kakugawa, President
20-20-20-20

OmniTrak Group, Inc.
1150 Davies Pacific Center
841 Bishop Street
Honolulu, HI 96813
Ph. 808-528-4050
Fax 808-538-6227
E-mail: aellis@omnitrakgroup.com
www.omnitrakgroup.com
Alan Ellis, Vice President
22-15-22-0

QMark Research & Polling
American Savings Bank Tower, 19
1001 Bishop St.
Honolulu, HI 96813
Ph. 808-524-5194
Fax 808-524-5487
E-mail: bankersmit@starrtech.com
www.starrseigle.com
Barbara Ankersmit, President
20-20-20-0

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

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

SMS Research & Marketing Services
1042 Fort St. Mall, Suite 200
Honolulu, HI 96813
Ph. 808-537-3356
Fax 808-537-2686
24-0-12-0

Ward Research, Inc.
828 Fort Street Mall, Suite 210
Honolulu, HI 96813
Ph. 808-522-5123
Fax 808-522-5127
E-mail: wrstaff@wardresearch.com
www.wardresearch.com
Rebecca S. Ward, President
12-12-12-12

Idaho

Boise

Clearwater Research, Inc.
1845 S. Federal Way
Boise, ID 83705
Ph. 208-376-3376 or 800-727-5016
Fax 208-376-2008
E-mail: info@clearwater-research.com
www.clearwater-research.com
Janice L. Rush, Admin. Director Research
80-80-80-80

Northwest Research Group, Inc.
225 N. 9th St., Suite 200
Boise, ID 83702
Ph. 208-364-0171
Fax 208-364-0181
E-mail: byalch@nwrg.com
www.nwrg.com
Rebecca Elmore-Yalch, President/CEO
60-60-60-60

Pocatello

Bernett Research Services, Inc.
Pocatello Phone Room
1800 Garrett Way
Pocatello, ID 83201
Ph. 800-276-5594
Fax 617-746-2709
E-mail: info@bernett.com
www.bernett.com
Andrew Hayes, Brother & Partner
220-220-220-220

Mountain West Research Center
775 Yellowstone Ave., #227
Pocatello, ID 83201
Ph. 208-232-1818
Fax 208-232-1466
E-mail: contact@mwrcenter.com
www.mwrcenter.com
Jared Schiers, Center Manager
100-100-100-100

Western Wats Interviewing Center
8 South 1st East
Rexburg, ID 83440
Ph. 801-370-2220
Fax 801-379-4197
E-mail: jwelch@westernwats.com
www.westernwats.com
Jeff Welch, V.P. Client Services
100-100-100-100
(See advertisement on p. 43)

Moscow

Bernett Research Services, Inc.
Moscow Phone Room
1420 S. Blaine, Suite 14
East Side Marketplace
Moscow, ID 83843
Ph. 800-276-5594
Fax 617-746-2709
E-mail: info@bernett.com
www.bernett.com
Andrew Hayes, Brother & Partner
220-220-220-220

Western Wats Interviewing Center
314 S. Washington
Moscow, ID 83843
Ph. 801-370-2220
Fax 801-379-4197
E-mail: jwelch@westernwats.com
www.westernwats.com
Jeff Welch, V.P. Client Services
60-60-60-60
(See advertisement on p. 43)

Illinois

Carbondale

Barbara Nolan Market Research
1620 W. Main
Carbondale, IL 62901
Ph. 618-529-8100
Fax 618-529-1606
E-mail: usr145@onemain.com
www.barbaranolan.com
150-150-150-150

Chicago

Adler-Weiner Research/Chicago, Inc.
6500 N. Lincoln Ave.
Lincolnwood, IL 60712
Ph. 847-675-5011
Fax 847-675-5698
E-mail: andi@awres.com
www.awres.com
Andrea Weiner, Managing Director
20-0-15-0

The Analytical Group, Inc.
640 N. LaSalle Dr.
Chicago, IL 60610
Ph. 312-751-2915
Fax 312-337-2551
E-mail: jerry.madansky@analyticalgroup.com
www.analyticalgroup.com
Tony Pacenti
50-50-50-50
(See advertisement on p. 53)

Angel Flight Marketing
222 S. Morgan
Chicago, IL 60607
Ph. 312-933-1878
E-mail: gmitchell@angelfly.com
www.angelfly.com
Gabriel Mitchell, Sales Development
15-15-15-15

Assistance In Marketing/Chicago
900 National Pkwy., Suite 150
Schaumburg, IL 60173
Ph. 888-827-1932 or 847-481-0400
Fax 847-481-0402
E-mail: bids@aim-chicago.com
www.aimresearchnetwork.com
Laura Shulman, President
10-0-10-10

BG

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360 N. Michigan Ave., Suite 1500
Chicago, IL 60601
Ph. 312-419-0400 or 800-666-9847
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www.bgglobal.com
Ross Pocs, Vice President
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E-mail: info@crmarketsurveys.com
www.crmarketsurveys.com
Cherlyn Robinson, Project Coordinator
10-0-10-0

Consumer & Professional Research, Inc. (CPR)
435 N. LaSalle St., Suite 210
P.O. Box 10884
Chicago, IL 60610-0884
Ph. 312-832-7744
Fax 312-832-7745
E-mail: pmorich@cprchicago.com
www.cprchicago.com
Peter Morich
15-15-15-15

Data Research, Inc.
1319 Butterfield Rd., Suite 510
Downers Grove, IL 60515
Ph. 630-971-2880
Fax 630-971-2267
E-mail: kcowles@data-research.net
Kathie Cowles, Exec. Vice President
25-15-25-25

DataPrompt INTERNATIONAL

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Chicago, IL 60601
Ph. 312-423-4100 or 800-468-0419
Fax 312-423-4101
E-mail: info@datapromptintl.com
www.datapromptintl.com
Chris Melton, Client Services
100-100-100-100
(See advertisement on p. 38)

Richard Day Research
P.O. Box 5090
Evanston, IL 60204
Ph. 847-328-2329
Fax 847-328-8995
E-mail: rdr@rdresearch.com
www.rdresearch.com
Richard Day, President
32-26-32-32

Dimension Research, Inc.
200 W. Pioneer Parkway, Suite 24
Peoria, IL 61615
Ph. 309-693-2600
Fax 309-693-2616
E-mail:
joe.schweickert@dimensionresearch.com
www.dimensionresearch.com
Ava Powell, General Manager
64-64-64-8

Discovery - National Qualitative Network
Chicago Discovery NQN/Heakin
3615 Park Dr., Suite 101
Olympia Fields, IL 60461
Ph. 708-503-0100
Fax 708-503-0101
E-mail: chicago@discoverynqn.com
www.discoverynqn.com
65-65-65-65

Fact Flow Research
311 S. Wacker Dr., Suite 2275
Chicago, IL 60606
Ph. 312-341-8117
Fax 312-341-8105
E-mail: answers@ffresearch.com
Diana Manos, Manager Rsch. Ops.
23-23-23-23

fieldwork

Fieldwork Phone Center
4849 N. Milwaukee Ave., Suite 500
Chicago, IL 60630
Ph. 888-TO-FIELD or 773-282-0203
Fax 773-282-6422
E-mail: info@phonecenter.fieldwork.com
www.fieldwork.com
Mary Pedersen, Manager
100-100-100-100
(See advertisement on Back Cover)

Focuscope, Inc.
1100 Lake St., Suite 60
Oak Park, IL 60301
Ph. 708-386-5086
Fax 708-386-1207
E-mail: krooney@focuscope.com
www.focuscope.com
Kevin Rooney, Vice President
31-0-31-0

Galli Research Services
3742 Bernard St.
Chicago, IL 60618
Ph. 773-4-SURVEY
Fax 773-478-7899
Paul Galli, President
5-0-5-0

HBS Consulting, Inc
100 North LaSalle St., Suite 1104
Chicago, IL 60602
Ph. 312-377-3816
Fax 312-377-8828
E-mail: valerie.kellogg@hbs-consulting.com
www.hbs-consulting.com
6-0-6-0

Inform Research & Marketing
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Chicago, IL 60611
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Fax 312-670-7259
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www.ir-m.com
Bill Drier, President
32-32-32-32

Integrity Research, Inc.
121 S. Wilke Road, Suite 200
Arlington Heights, IL 60005
Ph. 847-394-7940
Fax 847-394-7945
E-mail: info@integrityresearchinc.com
www.integrityresearchinc.com
15-15-15-15

IRSS - International Research Support Services
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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

Mid-America Research
Administrative Offices
999 N. Elmhurst Rd., Suite 17
Mt. Prospect, IL 60056
Ph. 847-392-0800 or 847-870-6262
Fax 847-870-6236
E-mail: randhurst@midamr.com
www.midamr.com
Debbie Ottenfeld
26-10-26-10

Mid-America Research
Randhurst Center
999 N. Elmhurst Rd., Suite 210
Mt. Prospect, IL 60056
Ph. 847-392-9770 or 847-392-0800
Fax 847-392-9891
E-mail: randhurst@midamr.com
www.midamr.com
Lori Tomoleoni
22-16-16-0

P&K Consumer Insights
6323 N. Avondale Ave.
Chicago, IL 60631
Ph. 773-774-3100 or 800-747-5522
Fax 773-774-7956
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(See advertisement on p. 45)

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www.pk-research.com/media.htm
Kristen Ozenbaugh-Dale, Vice President
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(See advertisement on p. 45)

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Chicago, IL 60631
Ph. 773-774-5085 or 800-642-3109
Fax 773-774-6881
E-mail: winnr@pk-research.com
www.pk-research.com/healthcare.htm
Rhonda Winn, Vice President
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(See advertisement on p. 45)

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O'Hare Corporate Towers
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Des Plaines, IL 60018
Ph. 847-390-8666
Fax 847-390-8885
E-mail: saa@preres.com
www.preres.com
Scott Adleman, President
30-0-30-30
(See advertisement on p. 74)

Questions & Marketing Research Svcs., Inc.
19211 Henry Dr.
Mokena, IL 60448
Ph. 708-479-3200
Fax 708-479-4038
E-mail: dtucker@qandm.com
www.qandm.com
Don Tucker
24-0-24-0

Research House
6901 N. Lincoln Ave.
Lincolnwood, IL 60712
Ph. 847-677-4747
Fax 847-677-7990
E-mail: RsrchHse@aol.com
Darlene Piell, Partner
24-0-24-0

Research International USA
875 N. Michigan Ave., Suite 2511
Chicago, IL 60611
Ph. 312-787-4060
Fax 312-787-4156
E-mail: info@riusa.com
www.riusa.com
150-150-150-150

Schlesinger Associates Chicago, Inc.
625 N. Michagan Ave., Suite 1500
Chicago, IL 60611
Ph. 312-587-8100
Fax 312-587-8400
E-mail: chicago@schlesingerassociates.com
www.schlesingerassociates.com
Robert Fitzpatrick, Facility Director
16-0-16-16
(See advertisement on p. 9)

Smith Research, Inc.
710 Estate Dr.
Deerfield, IL 60015
Ph. 847-948-0440
Fax 847-948-8350
E-mail: ksmith@smithresearch.com
www.smithresearch.com
Kevin Smith, President
24-10-24-24

Strictly Medical Market Research
Edens Office Plaza
4801 W. Peterson Ave., Suite 608
Chicago, IL 60646
Ph. 800-253-9095 or 773-202-3500
Fax 773-202-3511
E-mail: info@stirctly-medical.com
www.strictly-medical.com
Harry Balaban
10-0-10-0

Survey Center Focus, LLC
455 E. Illinois St., Suite 660
Chicago, IL 60611
Ph. 312-321-8101
Fax 312-321-8110
E-mail: surveycenter@ljs.com
www.surveycenterllc.com
140-140-140-140

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1945 Techny Rd., Suite 3
Northbrook, IL 60062
Ph. 847-480-1560
Fax 847-897-3000
E-mail: info@tbiz.com
www.tbiz.com
Larry Kaplan, CEO
120-90-120-120

TeleSight, Inc.
820 N. Franklin St. Suite 200
Chicago, IL 60610
Ph. 312-640-2528
Fax 312-944-7872
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www.tntmarketresearch.com
Harry Balaban
10-0-10-0

Tragon
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Buffalo Grove, IL 60089-1865
Ph. 800-841-1177 or 847-808-2080
Fax 847-808-0179
E-mail: info@tragon.com
www.tragon.com
Carol M. Sidel, Qaul. Acct. Manager
6-0-6-0
(See advertisement on p. 97)

U.S. Research Co.
1340 Remington Rd., Suite S
Schaumburg, IL 60173
Ph. 847-885-3300
Fax 847-885-9840
E-mail: USR142@aol.com
Margaret Krieg, Vice President
100-20-100-100

Peoria

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Peoria, IL 61614
Ph. 877-423-3462
E-mail: mail@affina.com
www.affina.com
Amy Hernandez
50-50-50-50

Scotti Research, Inc.
1118 N. Sheridan Rd.
Peoria, IL 61606
Ph. 309-673-6194
Fax 309-673-5942
E-mail: scotti@a5.com
Nancy Matheis, President
14-0-14-14

Indiana

Evansville

Product Acceptance & Research (PAR)
9845 Hedden Rd.
Evansville, IN 47725-8905
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Fax 812-867-8699
E-mail: michael.lloyd@par-research.com
www.par-research.com
Michael Lloyd, Director Mktg. Rsch.
40-40-40-0

Fort Wayne

Advantage Research of Northern Indiana
1910 St. Joe Center Rd., Unit 31
Fort Wayne, IN 46825
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Fax 260-492-5542
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www.advantageresearch.net
David Sokolowski, President
70-20-70-0

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Fort Wayne, IN 46835
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www.indianaresearch.com
Chris Cage, President
15-15-15-15

Gary

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www.kldresearch.com
Kathleen L. DeWitt, President
20-20-20-20

Indianapolis

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Fax 317-882-4716
E-mail: sue@herron-research.com
www.herron-research.com
Sue McAdams, President
24-0-24-0

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Fax 317-227-3001
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www.stoneresearchservices.com
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35-35-35-35

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Carmel, IN 46032
Ph. 317-574-7700
Fax 317-574-7777
E-mail: info@smari.com
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Indianapolis, IN 46240
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Fax 317-843-8548
E-mail: info@walkerinfo.com
www.walkerinfo.com
20-20-20-0

Iowa

Cedar Rapids

Epley Marketing Services, Inc.
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North Liberty, IA 52317
Ph. 319-626-2567
Fax 319-626-8035
E-mail: epleyms@epleymarketing.com
www.epleymarketing.com
Steve Epley, President
20-20-20-20

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Marion, IA 52302
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Fax 319-377-5861
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www.magid.com
Jane B. Cook, V.P. Field Services
138-138-138-138

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Davenport, IA 52801
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Fax 563-322-1370
E-mail: info@e-pmr.com
www.e-pmr.com
Bonnie Howard, Vice President
65-65-65-65

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

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

Des Moines

Marketlink, Inc.
Businesslink Division
4313 Fleur Dr.
Des Moines, IA 50321
Ph. 515-285-3420 or 800-434-3221
Fax 515-285-9640
E-mail: kcarlson@marketlinkinc.net
www.marketlinkinc.com
Kourtney Carlson, V.P. Client Services
24-24-24-24

Dubuque

ADVANCED DATA·COMM INCORPORATED

Advanced Data-Comm, Inc.
301 Data Court
Dubuque, IA 52003
Ph. 800-582-9501 or 563-582-9501
Fax 563-582-2003
E-mail: jsutter@advanced-data.com
www.advanced-data.com
John Sutter, Director of Marketing
500-500-500-500

Advanced Data-Comm is a full-service data collection center offering business-to-business survey, consumer interviewing and opinion research; CATI (Computer Aided Telephone Interviewing); predictive dialing; and remote monitoring. The company operates six Midwestern call centers within the United States.

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www.merrill.com
Steve Miller, Operations Manager
60-60-60-60

Mason City

Directions Research Corp.
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Fax 641-423-8494
E-mail: thultc@willowtree.com
Tom Thul, Partner
65-50-65-65

Shenandoah

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Shenandoah, IA 51601
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Fax 712-246-5420
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3. **ON-SITE** - No. of stations which can be monitored on-site
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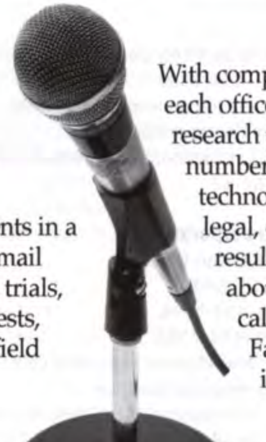

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40-40-40-40

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130-130-130-130

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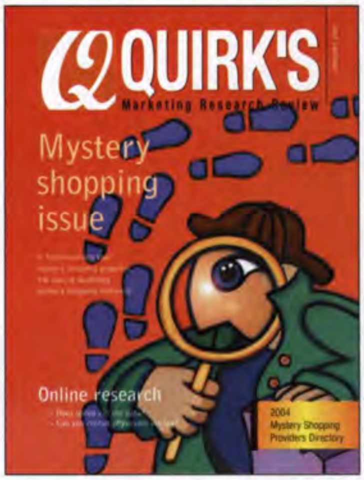

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By Joseph Rydholm, *Quirk's* editor

Creating, growing and defending your brand

My desk has been home to a bumper crop of worthwhile new books on brands and branding for the past several months and in the spirit of spring cleaning it's time to clear them off and make way for the next lot.

A standout in the group is *Brand Aid* by Brad VanAuken, which offers an almost encyclopedic look at every step in the brand process (designing, building, leveraging, managing). The advice is straightforward, voluminous and informed by experience. VanAuken also includes lengthy checklists at the end of each chapter that help readers assess their own situations and also serve as good platforms for brainstorming. Highly recommended.

Steve Yastrow's *Brand Harmony* is a bit too heavy on the business-book epigrams in the beginning ("Your brand is not what you say you are. Your brand is what your customers think you are.") but his insights quickly get more substantive after that. In addition to advocating the use of marketing research (never a bad idea) he also lays out a number of worthwhile exercises (which he calls Implementation Steps) designed to get marketers of all stripes to see the brand through the customer's eyes and find ways to make sure the right messages are being communicated. Even if some of the Steps aren't applicable to your situation, there are plenty of good ideas here to frame the process of analyzing a brand's image and figuring out what to do if that image isn't where you want it to be.

Each of the other three choices focuses on more specific brand-related issues. *Brand Driven* looks at the role of leadership, aiming its message at brand executives, human resources personnel and salespeople by raising key questions for each group at the end of each chapter. The authors have done themselves and their readers a bit of a disservice by choosing and rather inelegantly using a series of traveling and map metaphors to frame their discussion. But if, for example, you can look past the fact that the chapter on hiring and training brand-oriented employees is titled "Rev Your Engines," and approach the book with a patient attitude, you will eventually find worthwhile information. Later chapters aimed at managers handling branding issues in health care, start-up, non-profit and M&A situations dispense with the clunky constructs and focus on communicating helpful advice.

Once you have a brand established, there are all sorts of bad people out there who want to use the Internet to cash in on it. In *Defending the Brand*, Brian Murray looks at the many ways a brand can come under attack online (digital piracy, fraud, spoof sites) and explains how companies can use the Web to fend off their attackers and monitor what's being said and done in their brands' names. He also explores how to manage online partner compliance, how to deal with online commentary sites, and how to use online intelligence tools to stay one step ahead of your competition.

Taking a brand worldwide is the subject of Sicco van Gelder's *Global Brand Strategy*, in which he manages to make a seemingly impossible task more manageable, if no less difficult. He raises important questions and gives a framework for assessing brand affinity, brand reputation and local market conventions. And he offers advice on extending the brand and integrating (or "harmonizing") it with other brands in the stable, after a brand has gone global. Van Gelder's discussion of brand-building is thoughtful and wide-ranging, so even firms that aren't ready to introduce a product internationally can benefit from his insights. | Q

Brand Harmony (150 pages; $19.95), by Steve Yastrow, is published by SelectBooks, New York (www.selectbooks.com).
Brand Driven (334 pages; $39.95), by F. Joseph LePla, Lynn Parker and Susan Davis, and *Global Brand Strategy* (260 pages; $39.95), by Sicco van Gelder, are published by Kogan Page, London (www.kogan-page.co.uk).
Defending the Brand (268 pages; $27.95), by Brian H. Murray, and *Brand Aid* (306 pages; $24.95), by Brad VanAuken, are published by AMACOM, New York (www.amacombooks.org).

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