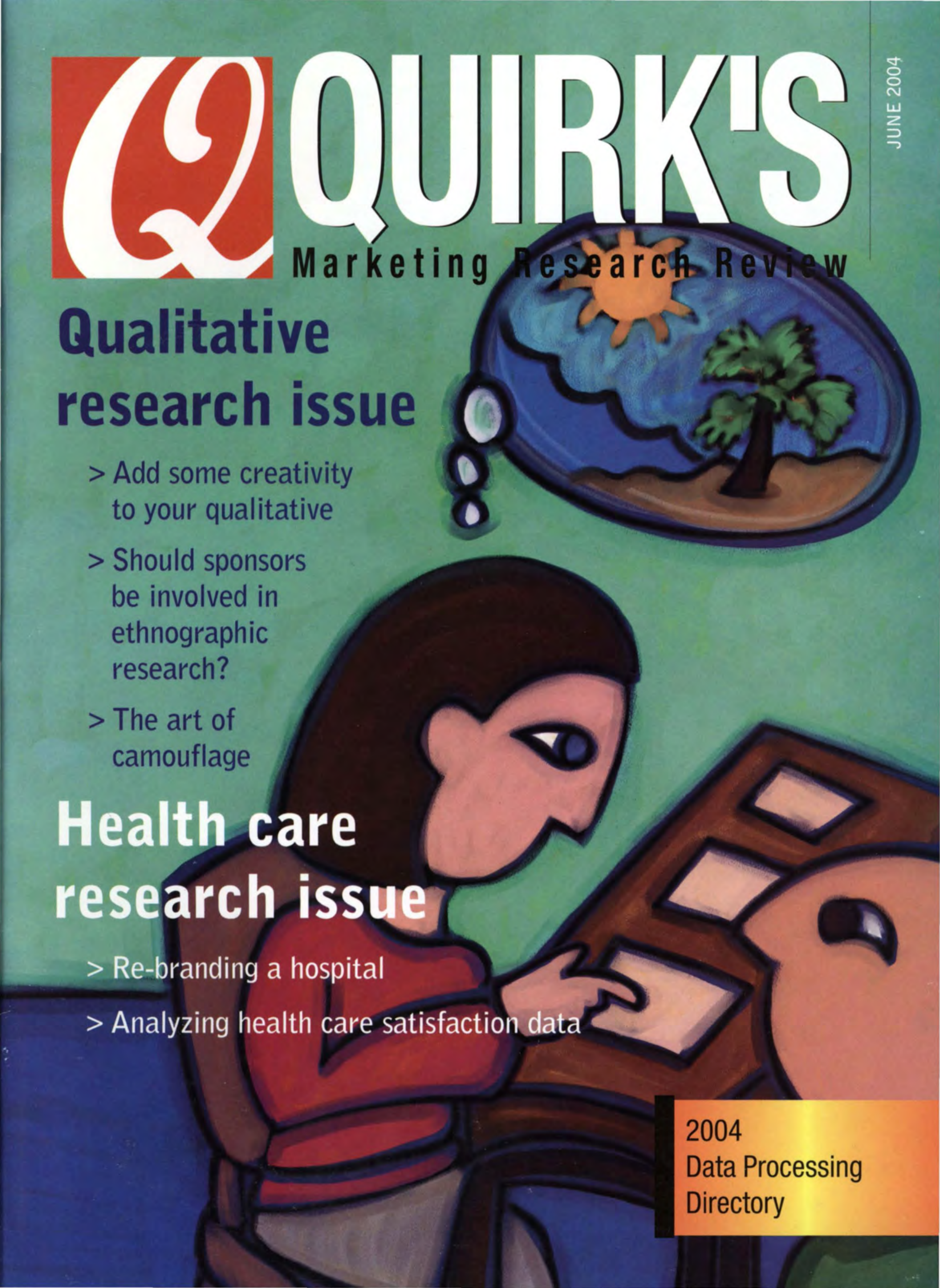

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Illustration by Jennifer Coppersmith

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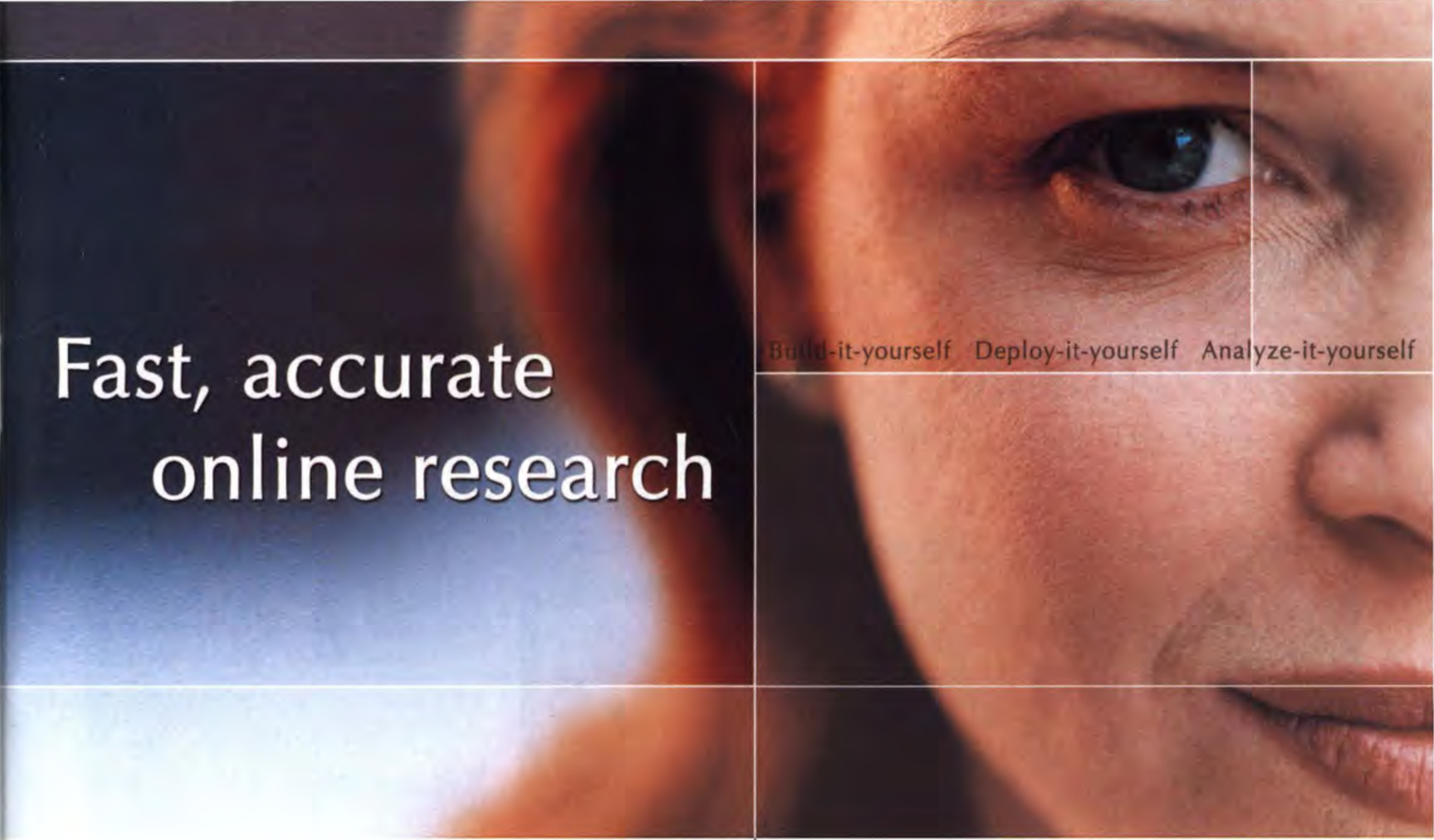

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Dollar stores continuing to win new shoppers

Data from New York-based ACNielsen U.S. shows that the fastest-growing retail channel in the consumer packaged goods industry - the dollar store channel - is continuing to attract new shoppers at a rapid pace.

According to an analysis of ACNielsen Homescan consumer panel data, fully two-thirds of all U.S. households now shop at dollar stores - up from 62 percent in 2002. Shopping frequency in the channel is growing as well.

In part, growth in household penetration for dollar stores is a function of the channel's growing availability to more shoppers. According to TDLinx, a retail location and hierarchy information source, store count for the channel grew from 13,342 in 2002 to 15,703 in 2003 - an increase of 18 percent.

While dollar stores are especially popular with low-income households, they are making their greatest gains with more affluent shoppers. Nearly half (49 percent) of all households earning $70,000 per year or more now shop at dollar stores - up 9 percent versus 2002. The higher income groups are also showing growth in shopping frequency.

"Aggressive store-count growth among the leading dollar store retailers is certainly a big part of the channel's success in reaching new shoppers," says Todd Hale, ACNielsen senior vice president, consumer insights. "But there are other factors as well. The variety of products carried by dollar stores is growing, especially in consumables. And, dollar stores are benefiting from the curiosity factor. People want to see what's available on deep discount."

An analysis of the top 10 product groups sold in dollar stores in 2003 shows that the channel continues to take share away from other retail channels. The chart shows each channel's share of the dollars spent in each product group in 2003 and the percentage change from 2002. As the chart shows, in all 10 product groups, dollar stores are continuing to grow their share of sales.

Most of the product groups in the chart generate over $1 billion in annual all-outlet sales, so even small share changes are significant. For example, paper products is a more than $16 billion product group. When the dollar store channel grew its share from 3.1 percent in 2002 to 3.6 percent in 2003 - a 16 percent gain - it captured nearly $809 million in new revenue. For more information visit www.acnielsen.com.

	Grocery		Drug		Mass		Supercenters		Club		Dollar		All Other	
Product	Share	Change	Share	Change	Share	Change	Share	Change	Share	Change	Share	Change	Share	Change
Candy	33.1%	-1%	13.4%	5%	17.9%	-7%	12.9%	8%	8.1%	-4%	5.1%	11%	9.5%	2%
Paper Products	44.7%	-4%	4.9%	2%	16.1%	-4%	12.1%	3%	14.0%	10%	3.6%	16%	4.6%	7%
Detergents	43.0%	-2%	4.4%	10%	16.0%	-4%	12.7%	6%	14.7%	2%	4.9%	2%	4.3%	2%
Stationery & School Supplies	8.1%	-7%	9.5%	3%	29.0%	-4%	19.2%	1%	3.9%	0%	4.6%	21%	25.7%	2%
Wrapping Materials & Bags	44.2%	-6%	2.9%	21%	14.2%	4%	12.3%	6%	13.7%	6%	6.5%	8%	6.2%	-2%
Snacks	58.3%	-3%	2.2%	0%	8.4%	-5%	12.3%	13%	9.3%	4%	1.7%	13%	7.8%	5%
Household Cleaners	37.9%	-5%	3.6%	6%	17.4%	-2%	13.7%	5%	9.9%	1%	6.7%	6%	10.8%	10%
Laundry Supplies	34.9%	-1%	3.0%	7%	22.0%	-2%	15.4%	5%	13.2%	-4%	4.5%	7%	7%	3%
Pet Food	37.1%	-7%	0.6%	-14%	15.3%	1%	15.3%	13%	6.2%	-2%	1.3%	30%	24.2%	3%
Batteries & Flashlights	16.7%	-5%	11.9%	-1%	22.7%	-2%	16.3%	5%	10.7%	-3%	5.0%	22%	16.7%	0%

Source: ACNielsen Homescan

America's favorite sports and activities in 2003

Fitness is king once again - as 12 of the top 30 sport/activity categories are fitness related. That's the conclusion of SGMA International's analysis of the

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names of note

Raymond Pettit has joined the New York office of *Wirthlin Worldwide* as senior analytic consultant.

The Marketing Research Institute International, Rocky Hill, Conn., has appointed career researcher **Larry A. Constantineau** to the position of president, succeeding **Michael J. Naples**. Constantineau will lead the Institute's efforts to grow enrollments in its distance-learning course, Principles of Marketing Research.

Andy Farr has been named head of the global brand investment unit at *Millward Brown*, Warwick, England. **Graham Page** has been promoted to global research and development director at Millward Brown, Warwick. **Shishir Varma** has moved from managing director, Millward Brown China, to Tokyo where he will lead the Nippon Lever account, and from July 1st, become joint managing director of Millward Brown Japan. Replacing Varma as managing director of Millward Brown China is **Michael Walkowiak**, previously global head of Consumer Insights for Henkel's cosmetics business. **Maria Vallis**, vice president, client service, has transferred from the Millward Brown Melbourne, Australia office to Los Angeles. **Derrith Lambka** has joined Millward Brown North America as senior vice president, Naperville, Ill. **Nick Findlay** will lead the new Midwest Region of Millward Brown as executive vice president, based in Naperville. The firm has also announced a number of promotions: **Karen Paterson** to senior vice president, in the Fairfield, Conn., office; **Peter Teachman** to senior vice president, general manager, Detroit; **Debbie McMahon** to senior vice president, group head, Naperville; **Tony Incalcatera** to executive vice president, Millward Brown IntelliQuest, Austin, Texas; **Ann Green** to senior vice president, marketing solutions, Fairfield, Conn.; **Pushp Kamal** to senior vice president, marketing science, Naperville.

Cincinnati-based *MRSI* (Marketing Research Services Inc.) has added five employees to its marketing research team: **Terri Hansel** has been named manager, automation and innovation; **Aaron Gulley** has been named project director; **Jalea Stowers** has been named associate project director; **Kathy Cope** has been named coder; and **Ruth Hadassah Baca** has been named staff assistant.

New York research firm *FIND/SVP, Inc.* has named **Marc C. Litvinoff** chief operating officer. Litvinoff will also become a member of the company's operating management group. **Rick Longenecker**, who joined FIND/SVP as executive vice president of business development in October of 2003, has also assumed direct responsibility for marketing (filling the vacancy left by **Andy Garvin**, the founder and president of FIND/SVP who retired at the end of 2003), and has thus been named chief sales and marketing officer. In addition, **Stephan Sigaud**, executive vice president of client services, has resigned to pursue other opportunities.

Kelly Saia has been promoted to research director at *The Collaborative Group LLC*, Baltimore.

Automotive industry research firm *CSM Worldwide* has named **Yale Zhang** director of emerging market vehicle forecasts.

Seattle-based *NetReflector, Inc.* has named **Brett Tucker** director, solution design, and **Gary Nicholas** now heads the company's client services group.

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Software enables qualitative data analysis

Australia-based software developer QSR International has launched XSight, a software program designed to assist qualitative researchers in the task of data analysis. The interface provides the researchers with their own personal white board, referred to as an analysis framework. Within each framework the researchers paint a picture around a central topic and develop themes and headings, adding comments from the research and their own interpretive thoughts. The findings can be entered directly into each framework or can be brought in from typed transcripts that are imported into the application.

A query feature allows users to slice and dice their findings. Whether querying for patterns between or across different target markets, or querying different themes, headings, brands, or just their creative thoughts, the software can accommodate these requests.

Team members can work together through the creation of shared white board outlines, i.e., templates that they create which reflect the main themes and headings of their findings. They can then merge their projects so that everyone has access to the shared findings.

The software allows users to create reports and presentations which can be exported to MS Word and PowerPoint. To ensure XSight is user-friendly, the software adheres to Microsoft guidelines and also uses specific market research terms. A 30-day free trial version is available at www.qsrinternational.com.

Evaluate Rx marketing campaigns with CTS Sales Test

Pharmaceutical promotion research firm ACNielsen HCI, Princeton, N.J., is now offering the CTS (Campaign Tracking System) Sales Test, a measurement tool to evaluate the sales force support of key message platforms and the use of sales material in order to provide the most effective Rx marketing campaign.

A foundation of ACNielsen HCI's campaign assessment process HCI MAPS (Marketing Analysis For Promotion Success), CTS Sales Test reveals why the sales force is/is not using sales material and driving the key message, then identifies and provides solutions for issues surrounding sales materials.

By surveying the response of a random, anonymous selection of sales representatives from a client company, CTS Sales Test is designed to garner accurate campaign reactions by allowing the sales representatives to speak candidly about their thoughts. This information is ultimately used to measure both the visual and message components of the sales material, to identify any sales force issues related to sales aid usage and to recommend corrective measures.

The CTS Sales Test poses questions concerning sales representatives' understanding of key messages, the conversations that sales representatives are engaging in, the most useful sales aids, and examines why certain sales materials are/aren't being utilized. Additionally, it evaluates representatives' response to visual aspects of the campaign such as the effectiveness of graphics in supporting key messages, layout, visual impact and functionality in detailing. For more information visit www.acnielsenhci.com.

Research firm unveils vacation Web site

Pioneer Marketing Research, Atlanta, has launched a Web site that helps parents find the best places to take a vacation with children. Called www.vacationswithkids.com, the free site contains ratings and verbatim remarks from more than 2,000 families who took vacations at least 50 miles from home in the last year.

Pioneer Marketing collected the ratings data from surveys it conducted in December 2003 and March 2004. Respondents provided information on the quality of accommodations, the quality of activities, the variety of dining options and the perceived value for the dollars spent on their vacation. The surveys also measured whether a family would return to a city or recommend that city to other families.

New program gauges health insurance product satisfaction

DSS Research, Fort Worth, Texas, has launched SatisAction, a satisfaction research program built to reveal snapshots of health insurance product performance and generate actionable recommendations for improvement.

SatisAction moves beyond member satisfaction measurement programs to allow for potential measurement of all key stakeholders, including members (new, lost and current for commercial, individual and Medicare products), employers (new, lost and current), patients, physicians/hospital administrators and brokers. Every SatisAction program includes reports and deliverables including: crosstab report with significance testing; profiling demographic characteristics of surveyed groups; trending against previous quarters or years; benchmarking against national, regional and local norms; spider chart analysis to delineate key performance factors; and correlation trees outlining the relationship between individual and overall measures. Projects can also include optional value-added reports and analysis, including: POWeR chart key driver analysis; structural equation model key driver analysis; customer value analysis (CVA); and overall brand strength analysis. For more information visit www.dssresearch.com.

Consumer-focused site aids product development efforts

Myproductadvisor.com, a Web site from Market Insight Corp., a Palo Alto, Calif., research firm, is designed to help consumers make the right product choices and also aims to give manufacturers insight into consumer product preferences. My Product Advisor helps those shopping for complex products narrow their focus and save time while finding the right products for them. Consumers answer educational questions to generate impartial recommendations that are customized specifically to their needs and preferences. By analyzing these consumer inputs, marketers can explore new product development efforts, product pricing, new feature introduction, and production scheduling. For more information visit www.marketinsightcorp.com.

Ethnic demographic data from GeoLytics

The new Planners Package for Ethnic Studies with demographic data from 1990 to 2008 is now available from GeoLytics. Population forecasting and planning has been hindered in the past by the problem of changing geographic boundaries over time. With the Planners Package, GeoLytics has resolved this issue. All of the data is converted to 2000 boundaries, so users can examine 1990, 2000, 2003, and 2008 data all in the same boundary definitions.

The regular Planners Package includes three census-based products: 1990 Long Form in 2000 Boundaries, 2000 Long Form, and the 2003 Estimates and 2008 Projections (with Consumer Expenditures). For researchers who need detailed data on ethnicity and race broken out by age and gender, they require an additional dataset - the 2000 Short Form (SF1).

The Short Form data also includes detailed breakouts of group quarters (nursing homes, college dorms, military barracks, and prisons).

All products come with built-in mapping capabilities. The software also exports data and boundaries to other products such as SAS, SPSS, ArcGIS, MapInfo, Excel and Access. For more information visit www.census-data.net.

Version 2004 of EZReport from Raosoft

Seattle-based Raosoft's EZReport Version 2004 provides analysis and reports for both non-expert and expert end users. EZReport is developed specifically to examine questionnaire and survey-type data.

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Reaching the ethnic consumer requires a new perspective.

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News notes

New York-based **NetRatings, Inc.** and **The NPD Group, Inc.**, Port Washington, N.Y., announced jointly that they have settled the lawsuit filed by NetRatings in March 2003. The lawsuit alleged that NPD infringed on NetRatings' computer use tracking patent (United States Patent No. 6,115,680) and breached a license agreement entered into by the parties in 2002. As part of the settlement, NetRatings and NPD have agreed on the scope of a license of NetRatings' patented technology to NPD for specific market research activities. Under the license, NPD may continue to utilize the technology for its MusicWatch Digital service and will have the right to continue development of other digital tracking services, provided that they do not compete with certain aspects of NetRatings' business. Additional terms of the settlement were not disclosed.

Nielsen Media Research, **Taylor Nelson Sofres** and **BBM Canada** have settled their patent litigation, which was scheduled for trial beginning in April. The action dealt with allegations that the picture-matching technology (or PMT) used by BBM Canada for its television ratings service and supplied by Taylor Nelson Sofres infringed on Nielsen's Canadian Patent 2,150,539. The Nielsen Patent concerns a method of metering television usage by reading codes and creating signatures associated with television programming viewed in homes.

The action also dealt with allegations that statements made by Nielsen Media Research concerning PMT were false and misleading.

Under the settlement, BBM will continue to use PMT in Canada and has acquired a license to use Nielsen's patent to serve its members' requirements. The patent license is limited to the patent rights and does not include any transfer of hardware or software. The issue of the statements made by Nielsen Media Research concerning PMT was also resolved.

All parties expressed satisfaction at having arrived at a fair result, enabling them to devote their resources to meeting client and member needs.

Figures released by the **British Market Research Association** (BMRA) reveal that British research industry revenues grew by 3.9 percent in 2003 to a value of £1.22 billion. Overall, the domestic sector, which makes up 79 percent of the market for U.K.-based market research companies, grew by 6.8 percent on the previous year.

These figures are an indication of the continued support for market research by U.K. businesses and organizations, which are increasingly looking to market researchers to deliver a more holistic, strategic service. "We believe the strong domestic performance reflects continued strong public sector spending and general economic recovery," says Peter

continued on page 87

Calendar of Events July/October

The Institute for International Research will hold Shopper Insights in Action, a research-oriented retailing conference, on July 12-14 at the Westin Hotel-Michigan Ave., 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.

Sawtooth Software will hold its annual conference on October 4-8 in San Diego at the Shelter Pointe Hotel and Marina. For more information visit www.sawtoothsoftware.com.

The Council of American Survey Research Organizations will hold its annual members-only conference on October 6-8 at the Hilton Head Marriott Beach and Golf Resort, Hilton Head, S.C. For more information visit www.casro.org.

The European Society for Opinion and Marketing Research, in conjunction with EMAC, will hold its research in marketing conference on October 10-12 in Warsaw. For more information visit www.esomar.org.

The Institute for International Research will hold its annual market research event on October 26-29 at the Hotel Nikko in San Francisco. *Quirk's* readers can receive a 15 percent discount on registration fees by using the code XM1628QUIRKS and registering via phone at 888-670-8200 or via e-mail at register@iirusa.com. For more information visit www.iirusa.com/research.

The Interactive Marketing Research Organization will hold its annual event in conjunction with the IIR annual research conference on October 26-29 at the Hotel Nikko in San Francisco. For more information visit www.imro.org.

The European Society for Opinion and Marketing Research will hold its annual Latin American conference on October 24-26 in Mexico City. For more information visit www.esomar.org.

SPSS will hold its Directions 2004 user conference on October 24-27 in at the Flamingo Hotel in Las Vegas. For more information visit www.spss.com/spssdirections.

The Qualitative Research Consultants Association will hold its annual conference on October 27-30 at the Tapatio Cliffs Resort, Phoenix. For more information visit www.qrca.org.

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☐	Diverse Moderators	✔
	TESTING RESOURCES	
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By Tom Neveril

10 qualities for qualitative researchers

To make sure a focus group or one-on-one interview goes as smoothly as possible, a qualitative researcher needs to have a range of skills. Here is a brief look at 10 of them.

1. They make a good first impression.

The first few seconds are especially critical when meeting a respondent. In the early moments of a qualitative session, the respondent is most uncertain about the interview, how to participate, how to behave and how to avoid conflict or "failure." To handle these situations, the respondent relies upon the reciprocity principle: We naturally attempt to repay in kind what has been provided for us. In other words, the respondent gives the moderator permission to establish the tone of the interview.

Effective interviewers take advantage of this heightened attention by giving the respondent 100 percent of their attention, making eye contact and smiling. They avoid studying the discussion guide, tinkering with stimulus material, talking with facility staff or appearing aloof in any way. This clearly communicates the expected tone for the interview and leads to reciprocated engagement and enthusiasm.

2. They're upfront about intentions and expectations.

As soon as an interview begins, effective interviewers immediately address the questions that are usually swirling around in the minds of the respondent(s). One might call it "answering the who, what and why" of the interview. For example, an effective moderator might start a typical focus group this way:

"Hello and welcome. Thank you for taking the time to participate in this important research project. My name's _______. I'm an independent market researcher. And I've been hired by a company that's interested in gathering your opinions about some products and services, which I'll talk more about in a minute. We're meeting in a group like this so I can hear when you agree, disagree or just think differently about what's being discussed. After the group, I'll write a report based on your honest, candid input. And hopefully, that report will help the client company better serve their customers. So that's why we're here. Any questions so far?"

Editor's note: Tom Neveril is founder and principal of Storybrand Consulting, a Santa Monica, Calif.-based firm. He can be reached at tom@neveril-planning.com or at 310-395-2324.

3. They create comfort.

Occasionally, focus group/interviewing facilities can be unpleasant. The problems generally involve: 1) unhelpful service staff; 2) untidy rooms; 3) uncomfortable furniture; or 4) poor food quality/options. However, I've found that most respondents will forgive nearly all of the above if they see the moderator attempting to create comfort.

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Some consider research a snapshot.
Others, a report card.

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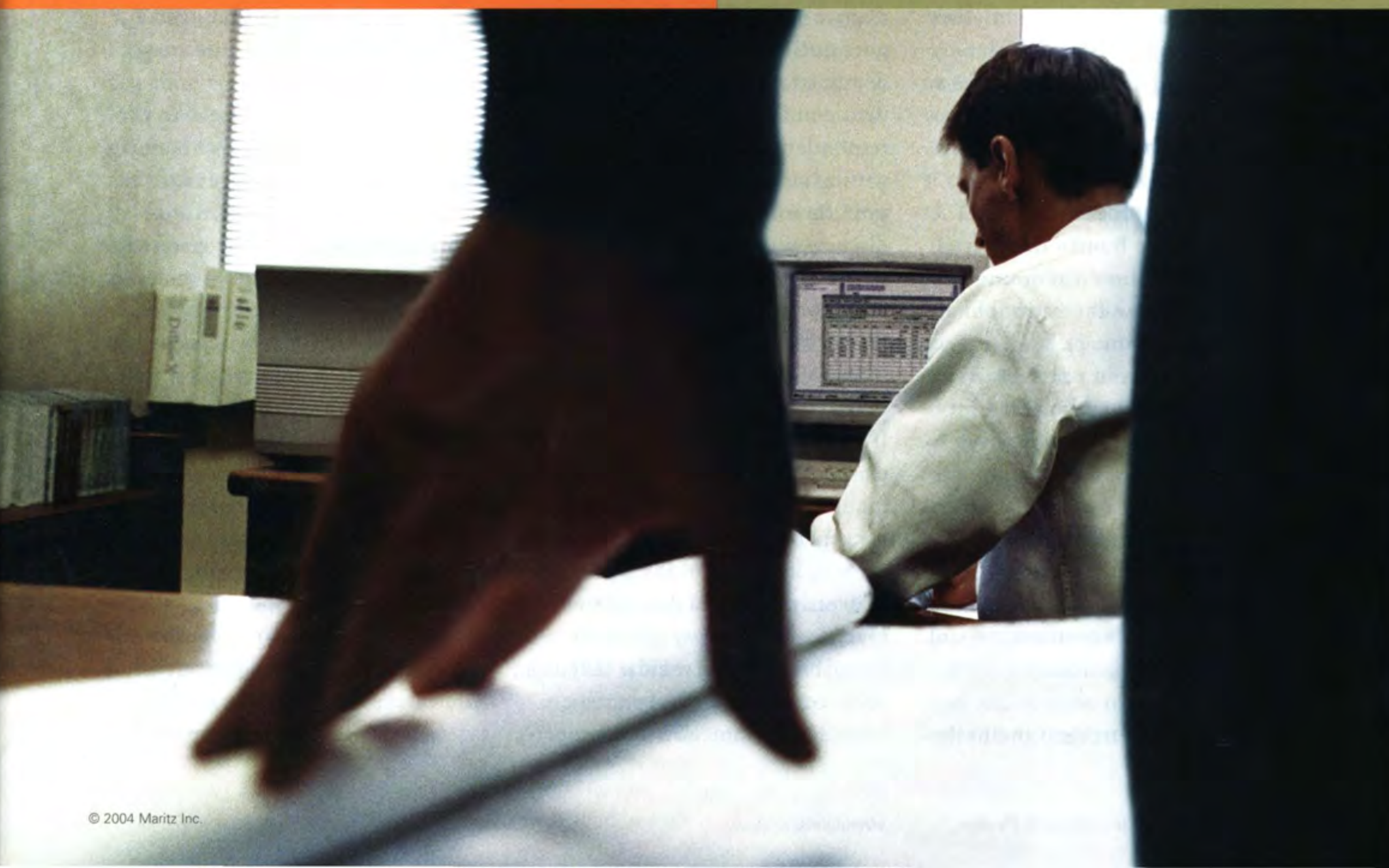

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An effective interviewer will always openly address the issue of comfort. If there are problems, they shouldn't try to ignore or hide them. Problems can be viewed as an opportunity to create an alliance with the respondent(s). And even when the atmosphere is great - as it often is - the moderator should make sure basic human needs are satisfied. They should announce permission to use the bathroom and make urgent phone calls when necessary (and without notice during focus groups). They should adjust temperature, seating and lighting to democratically maximize comfort. And they should always offer beverages and snacks.

Most importantly, they should always ask what can be done to make the experience more pleasant. Most people are generally willing to ignore distractions - except for something that threatens their safety. (For example, an ice storm can make a group exceedingly unproductive - especially after the power goes out!) The key, again, is to demonstrate an interest in respondent comfort. When that happens, respondents will reciprocate by forgetting about the atmosphere or even their own needs, and make the discussion the top priority.

4. They use regular language. Respondents will open up and share their personal stories only if they feel they're being understood. If an moderator is talking in "company-speak" or excessively using industry lingo, the respondent will invariably assume that the moderator is at least one of the following: a) overtly trying to demonstrate a high degree of savvy or intellect; b) incapable of using regular language; or c) avoiding regular language because it is somehow inappropriate for the interview. Of course, in any of those cases, the respondent will generally respond by steering clear of deeply personal or emotional territory.

One excellent way to evoke personal and richly emotional language is to demonstrate a respect for the respondent's selection of words. This is done through the reiteration of their quotes verbatim - including the non-verbal elements, if possible. For example, when the respondent has landed on a particularly important or even just very personal phrase, it should be written down. The respondent should see this. And when they've completed their thought, it should be read back to them just as they originally delivered it. Then they should be asked to make sure it's been recorded correctly. In the end, this process increases enthusiasm for the interview and garners more respect for

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moderator's words as well.

5. They request stories.

Respondent stories are an efficient way to uncover insights about brands. First of all, stories are the building blocks for creating memory and finding meaning in life. Secondly, they are the most natural way for people to communicate both rational and emotional ideas simultaneously. And lastly, stories are actually very efficient in conveying vast amounts of information through their characterizations, tempo, tone and structure.

6. They self-disclose to encourage self-disclosure.

The interviewer should carefully take advantage of opportunities to create a self-disclosure dynamic. This is not to suggest that he/she should share personal views about the discussion topic. Rather, it means the moderator should speak from the heart when explaining an exercise or providing examples to stir reaction. These moments of sincerity involve a small but important extension of trust which will often be reciprocated.

7. They use silence.

Effective interviewers know that silence is a powerful tool for evoking responses. It demonstrates respect, patience and a sincere interest in hearing what the respondent has to say. Most importantly, it gently prods a respondent to keep "digging." And that digging may result in a personal story, a human truth and a breakthrough idea.

8. They watch and listen to everything.

Moderators should demonstrate that they are giving their complete attention. This will lead to a richer discussion, causing respondents to be more expressive verbally and nonverbally - through body language, tone of voice, facial expressions, etc. Also, by paying attention to conversational flow and tenor, it may reveal the critical undertones or unconscious thoughts that are so important in brand communication.

9. They connect the dots on the fly.

In other words, the moderator should identify the consistent and/or contradictory thoughts throughout the interview. Not only does it demonstrate and inspire engagement, but it provides the opportunity to mine richer subject areas and depart from those that have been tapped out.

10. They have fun.

Intense discussions need moments of comedic relief, to release some pressure and to allow participants to refocus and reenergize. | Q

By Bill Davis

Write your RFPs right

When studies don't go as planned, nobody wins. That's why it is important for everyone involved to understand that data collection is driven by assumptions, and it is these assumptions that can make or break your research project.

Maybe you have witnessed a conversation like this:

Data Collection Company: *"Your RFP did not include an incidence assumption, so my proposal assumes it is 80 percent. If you look at bullet point eight on page three, you will see it. Since the study began, the actual incidence has been 40 percent, so the cost will be $60 per survey. Would you like us to continue interviewing? Would you like to change the screening criteria or lower the sample size?"*

Data Collection Buyer: *"What do you mean $60 per survey? I told you what the study was about. I did not read the fine print on page three. I can't go back to my client for more money, and I don't want to lower the sample size or change the screening criteria. Can we do it as-is for $40? I think I will be getting more business from this client and maybe we can make it up on the next project."*

The goal of this article is to help avoid these uncomfortable situations between research providers and their clients. The concepts could be applied to many other data collection methods, but for the purpose of article, I will focus on phone surveys. By intelligently preparing RFPs and clearly defining the playing field, buyers of data collection services will get proposals faster and there is a better chance that the study will go well and be profitable for everyone.

Nothing worse

As a provider of data collection services, there is nothing worse than receiving a call or e-mail saying something like, "Thanks, but we decided to go with another company. Your estimate was more than double the other estimates that we received and we just began fielding the project with another company."

When I hear something like this, my radar turns on and I think, "More than double the costs? That does not make sense."

What we many times realize is that we assumed ourselves out of the project. Let me explain.

Editor's note: Bill Davis is partner, Davis Research LLC, Calabasas, Calif. He can be reached at 818-591-2408 x4045 or at bill@davisresearch.com.

When we receive RFPs, we look for some key information as well as holes or vague statements. In addition, we look for clues to help answer two very important questions:

1. What is the likelihood that this project will really happen?
2. Is this project going to be exciting, profitable and help build a partnership?

When we receive RFPs that are vague, we call our clients to try to fill in the holes. The goal is to be sure the proposal is complete and the assumptions are realistic. During the conversation we agree on the information that is missing and then prepare a proposal.

At times, we have called to follow up on a pending proposal only to find that we were not awarded the project, and we were the only ones to fill in the missing assumptions. In

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these cases I feel bad for the data collection company doing the project as well as the client, because the project may be headed for trouble. Incomplete proposals generally lead to incorrect cost assumptions and partial data delivery. In order to get the information you need, you have to ask the right questions.

Misguided assumptions

I recently received another example of a proposal with some missing or misguided assumptions. The specifications sounded something like this:

- 900-1,600 interviews in total.
- 15-20 minutes in length.
- Two to four open-ended questions.
- Qualified respondents will have used Product X in the past six months or will considering using Product X in the next six months.
- Incidence is unknown; client supplied the sample.
- Data delivered in ASCII, possibly data tables (two to four banners, possibly weighted) or an SPSS file.

Please bid on each.

Sounds like a good project, doesn't it? The problem is that almost every assumption leaves room for interpretation, some of which will make a huge difference when calculating the costs.

RFPs like this are ripe for abuse from both parties. To get a project in the door, a data collection company could make whatever assumptions they like, prepare a proposal based on them and include some not-so-obvious costs buried in the proposal. Once the project is in the field, buyers really don't want to stop and start over again with another company, so they agree to pay more, but leave the experience with a bad taste in their mouth.

Unfortunately the buyer could abuse the situation as well. I have had the "help me out on this one and I will send you more business" carrot dangled several times, and it is tough not to bite. When I have bitten, I rarely ever hear from the buyer again.

So how do you avoid these types of situations? It depends on which perspective you are coming from. Let's look at both.

From the data collection perspective, the smart move is to call and ask questions like:

- Do you want a separate proposal for 15 and 20 minutes or should I assume 17.5?
- What exactly is Product X? If you can't tell me the name, what type of product is it?
- Are we calling consumers or businesses?
- Can we reveal your client's name (call on behalf of them) or is it a blind study?
- Do you want to code the open-ends or would you like verbatims?
- Will everyone get asked the open-ends or will only some people be asked the questions?

From the buyer's perspective, the most important thing is to define some critical elements of your research. If you don't define these things, expect that you will get a range of costs and you may be comparing apples to oranges. These critical elements include:

- Subject - What is the subject matter and purpose of the survey? Who are we calling?
- Screening questions - How many screening questions are there and how long will it take to ask them?
- Main survey - How long is the main survey?
- Incidence - What is the expected incidence? Incidence is defined as: (Completes + qualified mid-terminates) / (Completes + qualified mid-terminates + failed screening criteria)
- Sample information - Who will provide the sample and how much is there?
- Sample accuracy - If your client is providing the sample, what percent of the numbers are good, working phone numbers?
- Quotas and sub quotas - Are the quotas determined by something in the sample or something we ask?
- Open-ends - How many are there and do you want them coded

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or verbatim (or both)?

• Data processing - How do you want the data provided to you? You have several options: ASCII, SPSS, SAS, or data tables.

What do you do if you really don't know the critical elements? Some of my most successful client partnerships are with companies that call me before they send out a data collection RFP. There is nothing wrong with not knowing incidence and length, but you should make educated estimates. Identify a quality data collection company that you do business with and talk to them before you send out the RFP.

Important relationships

Another example of why these relationships are so important came in a RFP I recently received. The information initially provided was very limited:

- Consumer study; N=1,000.
- Client sample of 20,000 people.
- 10 minutes, no open-ends.
- Follow-up to a mailing sent by a bank.
- Incidence of 80-85 percent.

When I requested more information, my client checked and learned that a credit card offer had been mailed out to 20,000 people. The survey was with non-responders and we were screening for people who remembered receiving the offer, had opened and reviewed it, but did not respond. Their client was the advertising agency for the credit card company and felt 80-85 percent of the non-responders looked at it.

Having done similar work in the past, my client and I knew there was no chance of getting 80-85 percent incidence. I provided prices at a 10 percent and 5 percent incidence and my client did the same. We listed the costs if in fact the incidence was 80 percent, but said we felt the actual incidence would be much lower. My client did not get the project, but I feel sorry for the person who did. They will most likely see much higher costs than they expected, and probably not get the results they were hoping for.

Our firm has been doing phone surveys since the early '80s and have between 15-25 phone surveys going on at any given time. We have managed surveys dealing with many diverse topics and can help our clients make some realistic assumptions about their research. I want to help my clients win projects and I am more than willing to help. I know that I will not get every project, but when both parties are knowledgeable the projects that I do get have a higher likelihood of succeeding and will help us to build closer partnerships.

Benefits everyone

A well-written RFP benefits everyone. Data collection providers will take the RFPs more seriously and provide proposals faster. Buyers will discover potential pitfalls before they happen and will get proposals that are comparable. The best part is that research projects should go smoother and be more profitable for everyone. | Q

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By Patrick Quinlan

Begin with the right foundation

Analyzing satisfaction data in the health care setting

It's not news that health care providers face increasingly competitive environments. Maintaining, or even increasing, market share can be critical to reaching financial goals. Positive word-of-mouth from satisfied users to non-users, as well as repeat use of the service offerings by satisfied users is vital to achieving this goal.

Patient perception of the quality of individual service offerings undoubtedly affects intention to use other services. For example, patient perception of the quality of an emergency room encounter affects intention to use other services of that hospital. Therefore, measurement of patient satisfaction is essential as hospitals strategically allocate limited resources to result in increased performance.

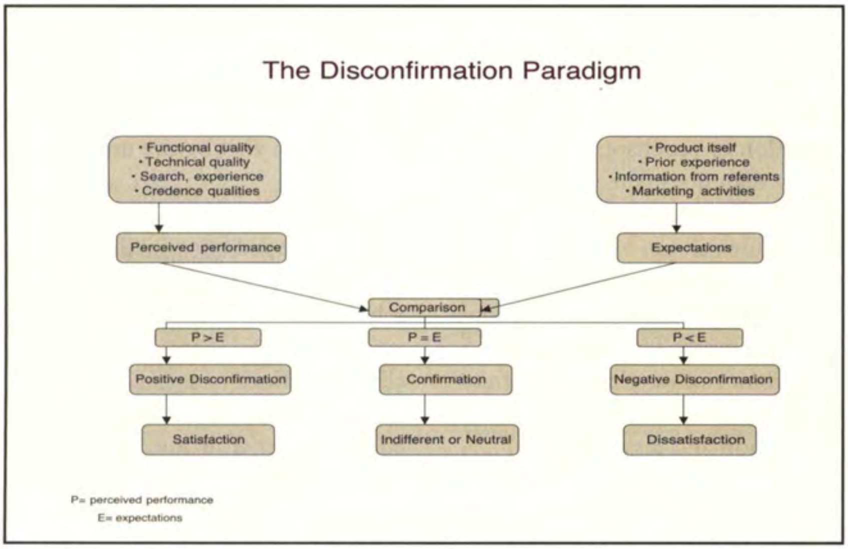
Satisfaction and service quality foundations

Several paradigms concerning the nature of consumer satisfaction have been generated, but disconfirmation theory, which suggests that satisfaction is a transaction-specific process where consumer expectations are compared to actual experience in specific service dimensions, is the most long-lived. (See graphic on the disconfirmation paradigm.)

In addition to gaining insight by comparing expected performance and perceived performance of individual service dimensions, we can also compare overall expectation of performance with overall perception of performance. An evaluation that measured satisfaction of individual service dimensions and measured overall satisfaction would yield more useful information.

Editor's note: Patrick Quinlan is principal of Quinlan & Associates, an Adrian, Mich., marketing research firm, and a professor of marketing at Adrian College. He can be reached at 517-264-3942 or at pquinlan@adrian.edu.

Service quality is a construct resulting from a long-term evaluation of an organization's service offerings. It is often measured with procedures quite similar to the expectation/performance approach of the disconfirmation theory and, in many instances, with the ServQual instrument developed by Parassuraman, Zeithaml and Berry. Their work identified a global definition of service quality as including tangibles, reliability, responsiveness, assurance and empathy. Service dimensions specific to a health care service encounter have also been discussed in the literature and are, for example: expressive caring, expressive professionalism, expressive competence (Bopp, 1990) and curing, caring and access (Joby 1989), among many others.



Although both consumer satisfaction and service quality issues have been explored in the marketing and health care literature, the nature of the relationship between service quality and satisfaction has been historically undefined. Understanding their combined impact on intention to purchase could provide great insight. Recent research suggests the

following:

1. Perceptions of service quality may be the drivers of satisfaction.

2. Overall satisfaction impacts intention to purchase more significantly than does perception of performance in individual service dimensions alone.

3. Individual service dimensions impact satisfaction and dissatisfaction differently. This suggests the importance of developing separate diagnostic models to evaluate both satisfaction and dissatisfaction.

Applying these foundations

A rural Michigan hospital was involved in applying TQM principles to the challenges of servicing non-critical patients in their emergency room setting. Rather than rely on traditionally accepted global measurement scales alone, a series of focus groups with former patients, spouses and parents of minor patients was used to identify determinants of satisfaction applicable to this particular setting. This qualitative phase yielded 20 service quality dimensions and a single measure of the perceived value of an emergency room visit by the non-critical patient.

The survey instrument that was then developed contained two overall measures of satisfaction. One, relying on the disconfirmation theory, asked respondents if their overall expectations of service quality had been met, not met, or exceeded. The other, utilizing a Likert format, provided a 10-point scaling of overall satisfaction.

Despite concerns expressed by hospital employees that it would set the bar too high, the frequency with which the sample provided the highest rating, a 10 on the Likert scale, was selected as the benchmark to which future performance would be compared. The percentage of future respondents providing the highest rating would prove to be a more responsive measurement to changes in overall patient satisfaction.

Utilizing the disconfirmation paradigm as the foundation, both importance and performance on the service dimensions were measured. Demographic and behavioral measurements were also made. A multistage mail survey resulted in a 40 percent response rate that provided 350 usable respondents. Nonresponse error was unknown. Hospital administrators felt the sample fairly represented the population. Legal counsel had been consulted for insight into confidentiality compliance prior to contact with former patients. No confidentiality concerns were registered by sampling frame members receiving any of the mailed materials.

Analysis and results

The hospital administrators required data they could use to properly prioritize desired improvements in service quality. Furthermore, it was

People have always talked with their hands.

essential that the information be understandable to all members of the hospital staff.

Examination of the correlation matrix indicated that the data was appropriate for factor analysis. A principal component procedure with a Varimax rotation was conducted and a six-factor solution was selected. One factor, AIDS Precautions, was selected with an eigenvalue less than one primarily due to the intense discussions in earlier focus groups where participants expressed extreme concern that hospital procedures must minimize the potential exposure of patients in the ER to blood of other patients.

The six-factor solution included Hospital Comfort and Concern, Physician Competence, Responsiveness to Patients, Billing Accuracy and Appropriateness, Time and AIDS Precautions (see Figure 1). While these do not perfectly replicate factors identified in marketing and health care literature, similarities are evident.

Figure 1: Factor Results

Time
Prompt arrival of physician
Time from end of treatment to discharge
Time of total experience

Billing Accuracy
Bills appropriate for level of care
Bills reflect actual physician services
Courteous initial contact with front desk

Hospital Comfort and Concern
Lab personnel express concern
Nurses express concern
Nurse treatment
Waiting room comfort
Treatment room comfort
X-ray personnel concern

Doc Competence
Puts patients at ease
Includes others in decisions
Correct treatment
Diagnosis accuracy

Responsiveness to Patient
Billing problems solved
Physician expresses concern for patient
Professional behavior of lab personnel
Professional behavior of x-ray personnel

AIDS Precautions
Hospital takes every precaution to prevent the spread of AIDS

Two stepwise discriminant analyses used factor scores as the set of predictor variables and the results of the overall satisfaction variable asking respondents if their expectations of performance had been met, not met or exceeded. Due to the untested nature of the instrument, a surrogate variable procedure was employed to provide factor scores.

Two separate discriminant analyses were performed: expectations met/not met and expectations met/exceeded as the dependent variable. The expectations met/not met analysis has important implications for the hospital since organizations that retain loyal customers may financially outperform organizations with higher market share and/or lower cost structures.

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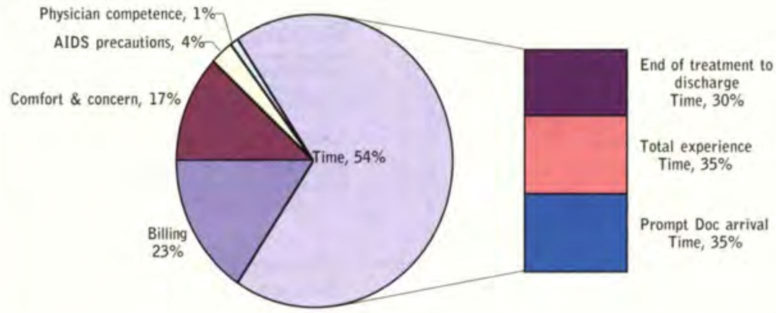
Figure 2: Eliminating Dissatisfaction



measure of the discrimination power of each factor, dissatisfaction was shown to be driven, in descending order, by patient perceptions of poor performance with Time (54 percent), Billing Accuracy and Appropriateness (23 percent), Hospital Comfort and Concern (17 percent), AIDS Precautions (4 percent) and Physician Competence (1 percent). Classification results indicated statistically significant differences between the groups.

The final step in analyzing dissatisfaction involved separate multiple regression analyses with the factor scores as the dependent variable and the performance rating for each of the variables constituting a factor as independent variables. The resulting Beta coefficients were scaled in response to the hospital's need for an indication of the percent of impact of each variable to the factor.

For example, in the eliminating dissatisfaction chart (Figure 2), you can see the relative contribution of the three variables comprising the Time factor. Patient perception of Promptness of Physician Arrival, Time from End of Treatment to Final Discharge and Time of Total Encounter contributed fairly equally to patient perception of the hospital's performance in moving them through a non-critical emergency room visit in a timely manner. This procedure was repeated to determine the relative impact of the individual variables to each of the other factors comprising this model.

Developing action plans aimed solely at minimizing dissatisfaction will not result in the intense loyalty and positive word-of-mouth that

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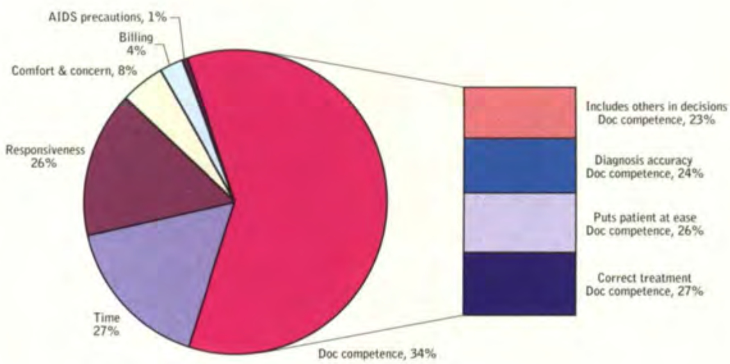
Figure 3: Increasing Satisfaction



are characteristics of organizational excellence. Therefore, a second discriminant analysis of expectations met/exceeded was performed to understand the antecedents of an overall state where patient expectations were exceeded. As Figure 3 shows, this resulted from, in descending order of importance, outstanding performance in these factors: Physician Competence (34 percent), Time (27 percent), Responsiveness to Patient (26 percent), Hospital Comfort & Concern (8 percent), Billing Accuracy and Appropriateness (4 percent) and AIDS Prevention (1 percent).

As with the Eliminating Dissatisfaction model, the contribution of each individual variable to each factor was generated to assist the hospital in prioritizing improvements. As shown in the Increasing Satisfaction chart (Figure 3), the individual variables contributing to the Physician Competence factor included Perceptions of Correct Treatment (27 percent), Putting Patient at Ease (26 percent), Perceptions of Diagnosis Accuracy (24 percent) and Physician Including Others in the Decision Process (23 percent).

Additional analysis including the focus group results revealed significantly more dissatisfaction among parents of patients under the age of 12 years and with certain types of diagnoses.

As you might suspect, there was a great deal of discussion surrounding the set of questions to be included in the physician competence section of the questionnaire. Like many small hospitals, this ER was staffed by physicians provided via a contractual agreement with an outside

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Sample XSight at www.qsrinternational.com firm. The desire of the hospital to secure a patient measurement of physician competency ultimately outweighed concerns that patients would not be capable of such an evaluation. It is interesting to note that the hospital's decision to include this set of questions was influenced by preexisting concerns about the outside physicians' competence voiced by some areas of the hospital.

Hospital response

Forty percent of respondents indicated that their overall expectation of hospital performance had been met, 20 percent indicated that their expectations had been exceeded and the remaining 40 percent rated hospital performance as not meeting expectations.

The hospital's top priority became the reduction of the number of patients who claimed their expectations had not been met. They aimed their efforts at improvement in the Time factor. Since that factor also had a significant impact (27 percent) on satisfaction, the hospital also felt that improvement on this factor would increase the number of future patients who report that their expectations had been exceeded. To this end, the hospital invested in a major renovation of the emergency room area. Separate entrances were created for trauma patients and for ambulatory non-critical patients. Separate triage areas were created as well. Finally, they developed a "fast track" system to quickly move less critical patients through the emergency room encounter.

Another area of hospital response centered on the contracted ER physicians. Focus group participants discussed the "good old days" when the hospital emergency room was staffed by local physicians. They characterized the current physicians as "outsiders," "unresponsive to community needs" and "uncaring." On the other hand, internal measurements of physician quality pointed to a competent emergency room staff.

Despite the focus groups' concerns and despite concerns of other factions in the hospital, the chief of staff was unwavering in his support of the contracted physicians. The hospital selected two actions aimed at improving satisfaction through the Physician Competence factor. Physician assistants were increasingly used in the diagnosis and treatment of patients. They also developed a public relations campaign to enhance the image of the ER physicians as being qualified, caring and highly competent.

Through using basic knowledge of customer satisfaction and service quality as a guide to data analysis decisions, this small hospital's administrative staff felt secure in its decisions to allocate funds and efforts in order to bring about desired quality improvements. | Q

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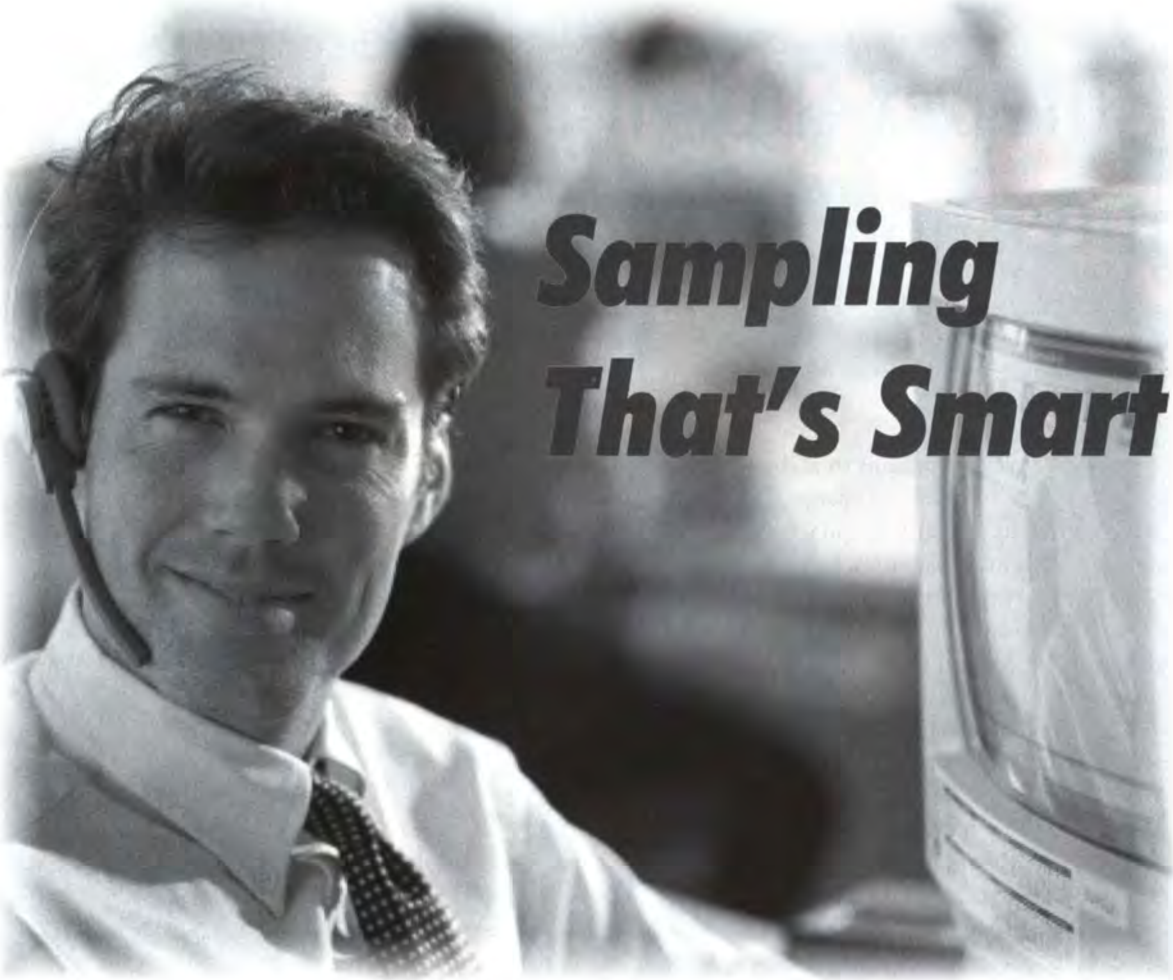

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Finding the right message

By David Kay

How to re-brand a hospital

There are two reasons to re-brand a hospital.

1. The hospital has changed. It has expanded from being a local community hospital to a regional hospital. It has amalgamated with other facilities. It has added services or specialities. It has become a teaching hospital or a research center in various areas. It has begun a significant outreach program. Most important, it can no longer be defined by its past history. Its reputation doesn't encompass its abilities.

It has to re-brand. The "product" must be redefined in the minds and hearts of the many internal and external stakeholders. And it has to be done correctly.

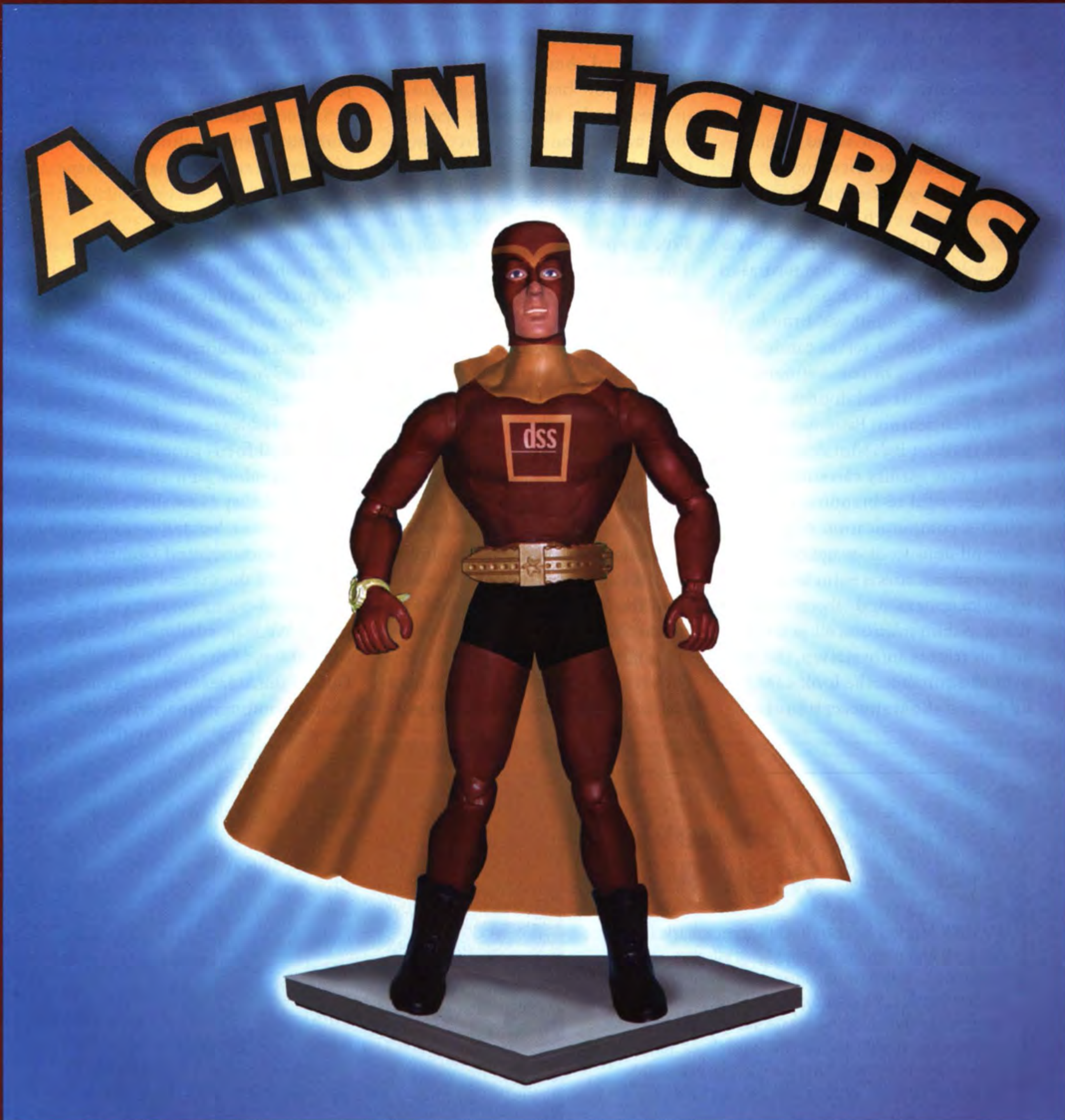
2. The hospital has a poor reputation in the community at large or among specific important sub-communities - for example, potential employees or donors. The reaction to the name Hospital X is negative - on a rational basis and on a visceral basis. If the hospital deserves its poor reputation, hopefully it will improve operationally before attempting to re-brand. But it must re-brand. It may also need to be re-named.

Complex expectations

A brand is a complex set of images and expectations that a user has of a product, service or company. It is defined by an emotional relationship between the consumer and the brand. The brand generates a set of attitudes that is not always articulated or understood by the consumer. Consumers don't always know why they reach for Coke rather than Pepsi, Nike rather Reebok or choose one hospital over another. But they internalize images. They have preferences. A well-branded organization is a trusted organization. It is the one to which the user turns first.

Re-branding a major hospital presents a series of unique challenges because its stakeholders are so varied and its importance to the community dwarfs almost any other branded product or service. The commitment or occasionally the hostility or mistrust toward it is unparalleled. Hospitals save lives. They are unique. Large hospitals are massive, complex organizations whose scope is barely understood by the public, or even by most of its employees. And like any other organization, hospitals rise or sink on a sea of dollars.

Editor's note: David Kay is president of Research Dimensions, Toronto. He can be reached at davidkay@researchdimensions.com.



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Why re-brand?

Why bother? Why go through the re-branding exercise? Why not accept a misunderstood, mis-branded hospital?

A hospital cannot afford to be mis-branded. A hospital needs a strong but credible image. Because the commitment to and the involvement of the hospital's diverse stakeholders is intense and is vital to its health and well being. Misunderstanding of what the hospital is and who it serves can lead to a damaging loss of commitment. Staff, volunteers and donors can be difficult to recruit. Patients can avoid the hospital. Morale and patient care quality can suffer.

A successful re-branding typically requires communication of a believable and consistent image through all communications vehicles. This includes general and targeted advertising, public relations, all printed and electronic information, the sign over the entrance, the look of the lobby, and the way receptionists answer the telephone. Even the organization's name should reflect the hospital's brand. Most important, the new brand message and image must be the correct one. It must be built on the correct platform. And it must resonate with the stakeholders.

Five steps

There are five steps to follow to ensure that the re-branded message is correct.

1. Know the hospital, its capabilities, history and plans. The brand must be based on reality.

2. Determine the views of the different stakeholders. How do they see the brand? How do they use the hospital?

3. Identify the gaps between the images held by different stakeholders. Also, identify the gap between what the hospital really is and how its stakeholders see it.

4. Determine the hospital's "believability potential," i.e., where can the hospital be realistically positioned in the minds of the different stakeholders? Just declaring that a hospital is like the Mayo Clinic or Johns Hopkins won't make it so.

5. Determine what image and communications vehicles will be effective in re-branding the hospital.

1. Know the hospital

Knowing the hospital requires reading published and private reports, but particularly it involves interviewing key senior-level staff, department heads, planning personnel, etc. These internal information-gathering sessions can provide unexpected learning. We conducted an internal focus group among senior members of a major hospital's satellite facility (a smaller ambulatory care center, located some blocks away from the central facility). A member of the central hospital's planning department was part of the group. We learned about the true capabilities of the satellite facility. But, to the amazement and chagrin of the planning manager, we also learned that the senior staff knew little about the hospital's plans. The facility was rife with rumor and the staff was suspicious and hostile.

2. Determine the views of the different stakeholders

At least seven stakeholder groups have to be understood, accommodated and persuaded. They are: patients; potential patients, i.e., local non-patients who live in the community; staff; donors; volunteers; the board of directors; and outside stakeholders such as politicians and media. And each stakeholder group is comprised of different sub-groups with different views and needs.

Following is a brief discussion of each stakeholder group and the information required from it.

• *Patients and local non-patients who live in the community*

Patients come first. Their needs have to be accommodated. There are two critical branding issues among patients.

First, who does the hospital serve?

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The patient population has to be compared with the hospital's catchment area population in terms of demographics and other characteristics. A significant part of the local population not using the hospital suggests a problem - or an opportunity. Is the hospital seen as welcoming to all people in its catchment area? Do some ethnic groups or some economic groups feel that this is not a hospital for them?

We discovered in one hospital study that a hospital with an excellent reputation was seen by many as being the hospital to which they go only if they have a very serious medical condition. For simpler, non-life-threatening issues they go elsewhere. This was a problem. It is usually positive to be seen as a premium brand - but not so premium that customers stay away. The hospital had to change its brand image.

Another hospital was seen as unwelcoming by a number of non-native English speakers. After learning about the problem, the hospital had to change how it dealt with these populations. Then it had to change its image and re-brand itself among those "rejecter" populations.

Second, how aware are patients and the community at large of the hospital and its offering, and how do they rate the hospital in practical-rational terms as well as emotional-image terms? How is the hospital viewed in terms of: service/medical quality; program offerings (areas of excellence); responsiveness; attitudes toward patients; efficiency/waiting time; leading-edge equipment; knowledge and professionalism of staff; reputation, brand-name leaders; cleanliness of surroundings; quality of food, etc.?

These are a few of the elements that make up the hospital's reputation, i.e., the public's expectations and image. These are the building blocks of the hospital's brand. These perceptions have to be explored. If perceptions are out of line, they have to altered.

One hospital with which we worked had developed a dozen areas of excellence in addition to its general community hospital range of services. It had become a teaching and research hospital with deep resources, technology and staff in areas such as cardiovascular conditions, genetic screening and neurological disorders. But we learned that many of its patients and potential patients thought of it as a hospital more suited to setting a broken leg than to handling serious medical problems.

These same issues apply to non-patients who live in the community but go elsewhere for treatment. It is imperative to understand their reasons before re-branding.

• *Staff*

Staff includes: medical staff, doctors, nurses and others; non-medical staff and non-medical professionals such as social workers, administration, assistants, catering, maintenance; and part-time as well as full-time staff.

Each of these groups has its own

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views and interests and has different ideas about what the hospital is and what it can and should be. These disparate views have to be understood.

Why bother? Because how staff sees the hospital is critical. Attitudes toward the hospital influence morale, which in turn significantly affects quality. It is difficult to imagine another business where quality is so crucial.

In addition, the contact level between staff and patients is very high. And staff attitudes affect the hospital's ability to recruit new employees.

To simplify, a hospital wants its staff to feel proud of the organization. Pride must be part of the brand. The hospital wants all potential staff to want to work there. When we asked one well-respected hospital department head about shortages in a medical speciality area that were causing difficulty for many hospitals, he replied, "We are not affected. [These specialists] want to work here. We have no shortages. We have no difficulty filling any positions." Good branding counts.

• *Volunteers*

In many ways, volunteers are the backbone of the hospital. Most of the comments made about staff also apply to volunteers. Volunteers, however, while appreciated, are sometimes ignored except with an annual Volunteer Appreciation Day. This is not enough. High morale among volunteers is very important. They save the hospital money. And they are a direct link to the community. Resentment among volunteers can be a problem. Their view of the hospital must be understood and become part of the re-branding exercise.

• *Donors and the board of directors*

The importance of donors to hospitals is self-evident. But there are different types of donors who often have totally different perceptions of the same hospital.

Community donors - that is, the local population who are also the hospital's patients and volunteers - tend to give cash to show their support. Their involvement is personal. It is their hospital. And the better they feel about their hospital, the more support they will provide.

There are also large donors, who generally also view the hospital as the one they use. They are motivated by loyalty. But they need special treatment and their views may be influenced by how they are treated as a donor. The hospital had better understand how these donors view the hospital before it re-brands.

Then there are the mega-donors who are typically the economic and social leaders of the region. They donate MRI machines or build hospital wings. They are also the supporters of the local opera or ballet company. They are on the board of major charitable organizations. They count in the community. And they contribute significantly to the charitable organizations that they support. They may never use the hospital themselves but they believe that supporting it is part of their responsibility, especially because the other community leaders also support it. Status and networking are part of their motivation for supporting the hospital. The hospital, however, has to be seen to be worthy of this type of support. This too must be part of the hospital's brand message.

These same issues apply to the board of directors, many of whom are also donors.

• *Outside stakeholders*

And finally there are the outside stakeholders, such as politicians and the media. Their views are critical because they can assist or obstruct the process of re-branding. As with the other groups, their views must be heard.

3. Identify image gaps

In various hospital branding projects, we inevitably find gaps between what the hospital is and how it is viewed by many of its

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Consulting and Strategic Market Research stakeholders. And we inevitably find major differences between the different stakeholder groups' views. These have to be brought into line so that consistent, believable and relevant communications can be carried out.

The first step is to determine what is important to all or most stakeholder groups. What is of interest to the accountants may not be of interest to the patients or to the donors. Then it is necessary to see how the different interested parties view the hospital in those areas.

A series of image grids can be a useful starting point, with the vertical axes being positive to negative, and the other axes being image/performance factors.

General image grids can be based on:

• Customer satisfaction measures for all aspects of satisfaction, at all stages in the hospital stay process. How long did the patient wait to check in, to have an x-ray and blood test taken; to see the doctor, etc.?

• How caring are the medical staff and volunteers?

• How comfortable is the facility - is it welcoming or intimidating, does it speak the language of the patient if English is not their first language, etc.?

• How organized is the hospital? For example, do records "flow" from one department to another? Does the patient give his or her information only once or every time a different specialist or department is encountered?

• How complete were the discharge instructions?

• How complete was the follow-up?

• Perceived success: is the hospital seen as up to date, growing, first in terms of adding services, first choice for patients, first choice for staff, etc.?

Technical image grids can be based of perceptions of quality-specific areas of excellence, i.e., how well is the hospital perceived in terms of: its oncology department; neonatal department; emergency

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department; geriatric research facilities; reputation as a teaching facility, etc.?

The list of image/performance factors is extensive. Nevertheless it is important that all of the stakeholders' views are determined and if there are discrepancies, they must be resolved.

In one study, we found that a hospital's professional staff believed that its treatment of patients and of care-givers (parents, spouses of patients, etc,), was exemplary in human terms. They saw themselves as being informative, caring, nurturing, sympathetic and willing to go out of their way to make the patient feel comfortable. The patients were reasonably satisfied on this count but the care-givers unfortunately tended to be ignored and they were decidedly not satisfied. Changes in procedures were obviously required.

In another hospital, we found that senior staff believed that the technical excellence of the hospital wasn't known to potential professional hires. They were mistaken. The hospital was well-known for its excellence among medical students and staff who were beginning their careers. This had a major influence on recruitment efforts and communication plans.

4. Determine the hospital's "believability potential."
When talking with these groups, it is also important to determine what they will believe and what they will accept. One hospital mentioned above had far outgrown its origins. We learned that the community was barely aware of its new services and improved levels of excellence. More important, many didn't want their hospital to be "improved." They wanted their hospital to remain a small, local community hospital (despite occupying six buildings). They equated "local community" with "friendly and responsive," and saw it as "a hospital where the nurse will hold my hand if I am frightened." They associated large, world-famous teaching hospitals with terms like unfriendly, unresponsive and distant - places to go to if you need a heart transplant but not if you are "merely" ill.

When speaking with these groups, one must determine what they will accept and what they will believe. Then the branding strategy and if necessary the re-naming strategy must be written within the limits of what the stakeholders will believe.

When asking stakeholders how they view the hospital, it is also important to ask them how they would respond if they and the public were told that their hospital is a leader is diabetes research, or has the largest trauma center in the region or whatever. Stakeholders, including the general public - which is not involved in a daily basis - will inevitably accept certain claims and resist others. Communications plans and all branding plans have to take this into account.

5. Determine what image and communications vehicles will be effective in re-branding the hospital.
Our hospital clients have told us that they tend to rely more on PR rather than on paid advertising, perhaps because public media is more receptive to hospital news than to other corporate news. But this should be decided by the hospital communications staff.

Hospitals, however, generally have direct access to their stakeholders. Staff, volunteers, patients and donors can usually be reached with newsletters, and with direct mail or e-mail communications vehicles. These are usually less costly than other media. And it is fairly simple to determine which internal, controlled media is most effective.

Reaching the wider community is more difficult. But branding efforts must be made in concert with other communications efforts such as fundraising campaigns, and the efforts must be long-term.

No small task
Re-branding a hospital is certainly no small task. As we have discussed, there are many audiences and stakeholders to consider when undertaking such a project. And talking with and listening to each of them can be time-consuming. But doing so will provide the most complete picture possible and give the re-branding effort a wealth of crucial information from which to draw. Q

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Take it to a higher level

By Nancy Cook

Broadening the scope of market research through the use of multiple survey instruments can provide a more accurate picture of overall patient satisfaction and greatly enhance patient satisfaction results for the health care industry.

Patient satisfaction has become a routine measure of quality for most hospitals. Almost all hospitals administer some form of patient satisfaction survey, realizing that there is a direct correlation in quality of care and patient satisfaction. Because of this vital link, some hospitals now offer recognition and reward programs for improved patient satisfaction scores.

The results of patient satisfaction surveys will likely become another publicly reported quality indicator of health care facilities. The Agency for Health Care Research and Quality (AHRQ), in collaboration with other federal agencies, is in the process of developing a national standard for assessing hospital patient experiences. The survey tool is one measure included in a Quality Initiative, jointly promoted by three prominent health care trade organizations: the American Hospital Association, the Association of American Medical Colleges, and the Federation of American Hospitals.

Patient satisfaction surveys alone don't improve quality

In other industries, customer satisfaction is measured by how closely expectations are met. Results are analyzed and service is improved.

Effective patient satisfaction research requires multiple survey instruments

The process is no different for the health care industry; however, expectations are of a much more personal nature, are sometimes subtle, and are often more difficult to define. Most hospitals routinely conduct patient satisfaction surveys that involve a series of rating questions about attributes specific to the patient's hospital stay - from registration to discharge.

For health care facilities that want to improve on their service and level of patient satisfaction, it's imperative that they know exactly what their customers expect. This includes both service and clinical expectations. Further, they must be willing to create a culture that embraces and strives for continual improvement in the quality of all the services offered to patients.

Aside from the obvious, such as improved level of medical care, reduced wait-time in the emergency room and fewer mistakes with

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medications, hospitals need to determine what is most important to patients. Is it friendly nurses and physicians, appetizing food or comfortable rooms? While quality of medical care is certainly the most important factor, health care professionals must look beyond providing the most up-to-date technology and care if they want to achieve the highest level of satisfaction among their patients.

Routine patient satisfaction surveys are a valuable tool for gaining a good understanding of what patients expect and how well the hospital is meeting expectations. However, other organizational assessments should not be ignored. In fact, taken together, multiple survey instruments will have a far greater impact on improving quality than the patient satisfaction survey alone.

Low employee satisfaction equals low patient satisfaction scores

Routine patient satisfaction surveys pinpoint areas for improvement but often fail to uncover other areas that should be addressed. As part of a total satisfaction assessment program, hospitals and health care facilities should conduct annual employee satisfaction surveys. Research has shown that satisfied employees care more about the quality of their work and therefore, provide better customer service than dissatisfied employees.

Employee satisfaction surveys can help to identify administrative policies that may be undermining the ability of hospital staff to be responsive to their patients. Correcting such issues will directly impact patient satisfaction.

Physician satisfaction surveys will reveal if their needs are being met in terms of resources, services, technology and communication. If physicians are unhappy with hospital administration, availability of services or level of technology, their frustration will ultimately impact patient satisfaction and the hospital's ability to remain competitive.

Employee and physician satisfaction surveys also provide the benefit of improving recruitment and retention. Hospitals with a reputation for satisfied employees and physicians are more likely to recruit and retain individuals of the highest professional standard. Once again, patient satisfaction comes out the winner.

A competitive advantage

Community assessment surveys rate image and brand awareness, gauge the community's satisfaction with health care providers and reveal patient expectations. Usually, these measures are not directly correlated with patient satisfaction; however, being aware of preconceptions and perceptions among the general public will give a hospital a competitive advantage. After all, these respondents may be past or future patients who will measure the facility based on their own experiences and expectations.

A health care facility can also pinpoint the key indicators for patient satisfaction. In other words, the very attributes that are most important in the selection of a hospital or health care facility can be specifically determined. These key indicators should be given a greater weight in the analysis of satisfaction.

The community assessment survey identifies the manner in which a health care facility may establish, build or change its desired image. In addition, the hospital learns where it stands relative to the competition and is enabled with the means for a solid branding strategy.

What does this have to do with patient satisfaction? A solid marketing campaign that successfully characterizes the nurses at Hospital A as being caring and sensitive will create this image. People will recall the image when they interact with the facility and the satisfied employee will demonstrate that this is, in fact, a reality. The patient's expectations are confirmed and the resulting sat-

isfaction rating is, therefore, high.

In-depth research translates into quality improvement

Key indicators of satisfaction should be researched in more detail. For example, assuming quality of nursing care is a key indicator of overall patient satisfaction and carries more weight than the cafeteria food, a health care facility would be wise to invest in more detailed satisfaction research among the nursing staff. Focus groups or one-on-one interviews can yield a greater depth of information about issues critical to patient satisfaction.

Survey research among patients, employees and physicians often corroborates evidence of a specific problem area. Undertaking in-depth research regarding the issue will increase the likelihood that the problem will be resolved by employing the best possible solution.

Research has recently focused on hospital environment as a key indicator of quality of care. The Pebble Project, an initiative implemented by The Center for Health Design, documented that facility design does indeed improve quality of care, financial performance, community perception and staff retention. Improved patient satisfaction would no doubt follow along with these indicators.

A hospital or clinic investing in new facilities or redesigning existing facilities should first determine the aspects of design that are most important and preferred. This should involve input from employees, physicians, visitors and patients. Photos of prototypes can be presented to a focus group and evaluated in terms of function, comfort and aesthetics.

Assuming that a baseline measure is taken, follow-up research can validate or challenge claims of improved satisfaction among employees, physicians and patients as well as assess the impact on community perceptions.

Broadening the scope

Health care delivery is becoming increasingly competitive and consumers are more involved in the selection process than ever before. Thus, it is imperative that hospitals adopt a more sophisticated approach to market research as a vital component of the marketing function.

When hospitals take a proactive approach by expanding their market research initiatives, they are making a commitment to improving patient satisfaction and quality. Patient satisfaction surveys, alone, only scratch the surface.

Health care providers must look beyond the routine patient satisfaction survey and consider broadening the scope of their market research. Implementation of a total satisfaction program will significantly boost patient satisfaction scores and demonstrate a provider's true commitment to quality. | Q

health care research

Simulating success

How simulators can aid successful pharmaceutical product launches

By S. Kent Stephan

A recent article in the *Wall Street Journal* reported that the pharmaceutical industry spends $1.7 billion in research and development for every drug that is ultimately approved by the FDA for marketing in the United States. With such astronomical numbers, the stakes are very high for a drug to even recoup its investment.

Accurately forecasting whether a new drug will capture the loyalty of physicians is almost as difficult as developing it in the first place. The odds of even bringing it to market are extremely long. Forecasts of so-called experts are often wildly inaccurate, sometimes as much as several times more than the drug's actual sales.

Today, most pharmaceutical companies conduct traditional market research before launching a new drug. But there is a better way. It's called computer simulation or mathematical modeling. And, if done correctly, it can plot a roadmap to the greatest profit with the lowest risk - before the product is even launched!

New products have always been difficult to forecast, whether they are prescription pharmaceuticals, laundry detergents, toothpastes or candy bars. In industries such as consumer packaged goods, companies have used test marketing to reach go/no-go decisions and forecast national sales for over 100 years. They have sometimes used multiple test markets to help determine the combination of strategies and tactics that will produce the best results.

For obvious reasons, prescription pharmaceuticals can't be test marketed. Test marketing requires that controls be placed on the retail distribution of the product, which is almost impossible for prescription brands. In addition, compared to consumer brands, prescription brands have very short life cycles. After spending more than $1 billion to discover and develop a new drug, a pharmaceutical company needs to start recouping its investment as soon as possible rather than delay the national launch to spend up to a year running tests in small, isolated pockets of the country.

A few decades ago, some packaged goods companies began to realize the value of mathematical modeling and the shortcomings of test marketing. Today, complex mathematical simulations have largely replaced test marketing in many of the leading consumer goods companies, and are becoming more popular with pharmaceutical companies who realize that accurate simulations may obtain for them what test marketing

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may not.

Instead of being able to test only one or two variables per market, practitioners can now test literally hundreds, even thousands, of different scenarios with computer simulations to ascertain which will be the optimal choices on all counts. Advantages include being able to learn:

• what combination of marketing tactics will maximize profits for a given brand;

• which advertising copy points will generate the largest market share;

• what price will maximize profits;

• how to optimize sales force productivity for greatest profits (i.e., the number of calls a sales rep must make to each doctor in his/her territory based on each doctor's responsiveness);

• what the growth potential or projected market share of a product will be over several years (this is important in determining how much money will be budgeted against a product).

How simulators work

Simulators are developed by measuring consumers' responses to a description of the new product. A handful of highly-trained experts are then able to translate these responses into forecasts of the general audience's reaction to the new product as it is promoted, not just hypothetically but in the real world. As such, simulators not only can forecast the impact that the brand message will have on people, but how this impact will play out at different levels of advertising and promotion, thereby enabling the marketer to choose the best mix. Interestingly, while both packaged goods and pharmaceuticals traditionally treat marketing and forecasting separately, an accurate forecast can - and should - determine what the marketing plan should be, since it can show which tactics are best to use and to what extent they should be used.

Simulators are used in the packaged goods industry for several reasons. First, they are much faster and cheaper than test markets. Second, they avoid exposing one's new product ideas to the competition. Third, as previously mentioned, simulation makes it possible to generate forecasts for a limitless number of promotional plans for any tested message. Finally, packaged goods simulators usually produce forecasts that do a good job of estimating the launch year.

Simulation in the pharmaceutical industry actually has certain distinct advantages over its counterparts in consumer goods. First, a worthwhile prescription brand simulator produces national forecasts that are more accurate than test marketing.

Second, the forecasts change in response to very small changes in the tactical plan. Packaged goods simulators are far less sensitive to promotional plans. Therefore, a good pre-

scription brand simulator is a more valuable planning tool than its consumer goods counterpart.

Finally, a good prescription simulator can create optimized solutions. It can be used to optimize the marketing message and the tactical (promotional) plan. For example, the simulator can be made to specify the least-cost tactical plan needed to achieve a feasible market share. Simulating the launch of a new prescription brand requires that two key elements be quantified:

1. The maximum market share which the brand could ever achieve if launched with the tested message. This is called the brand's maximum potential share. It is specific to the tested message and may differ if the brand is described in another way.

A maximum potential share is the highest share the brand could achieve in the current competitive environment if it were promoted using every resource that could be effectively expended against the brand. It is a number that has been approached but never actually reached. In a world of diminishing returns, gaining the last few share points or fractions of share points costs far more than the potential gain.

A brand's maximum potential share, unfortunately, is not a constant, even if the competitive environment doesn't change. If a new brand is lightly promoted in a large, competitive category, its maximum potential share will be reduced.

2. The "uptake curve." The uptake curve answers the question "How much of the maximum potential share will be achieved at any point in time, assuming a given amount of promotional effort?"

In the pharmaceutical industry, the primary vehicles for promoting to physicians are sales calls, product samples, journal ads, direct mail and special events. Special events include activities like seminars and group discussions. A high-quality prescription drug simulator accounts for each of these elements in fine detail.

The uptake curve enables a company to see how many prescriptions will be written month-by-month during the first year, if it implements a given tactical plan. Most importantly, it also enables marketers to work through scores of tactical scenarios before committing to an irreversible course of action in the real world.

The simulators that are used to forecast consumer package goods assume a universal uptake curve. Most of the time, this is a valid assumption. In the pharmaceutical industry, uptake curves can vary considerably. For example, one prescription brand might achieve two-thirds of its maximum potential as a result of only one sales call per doctor. Another brand might require a dozen or so sales calls to reach two-thirds of its potential.

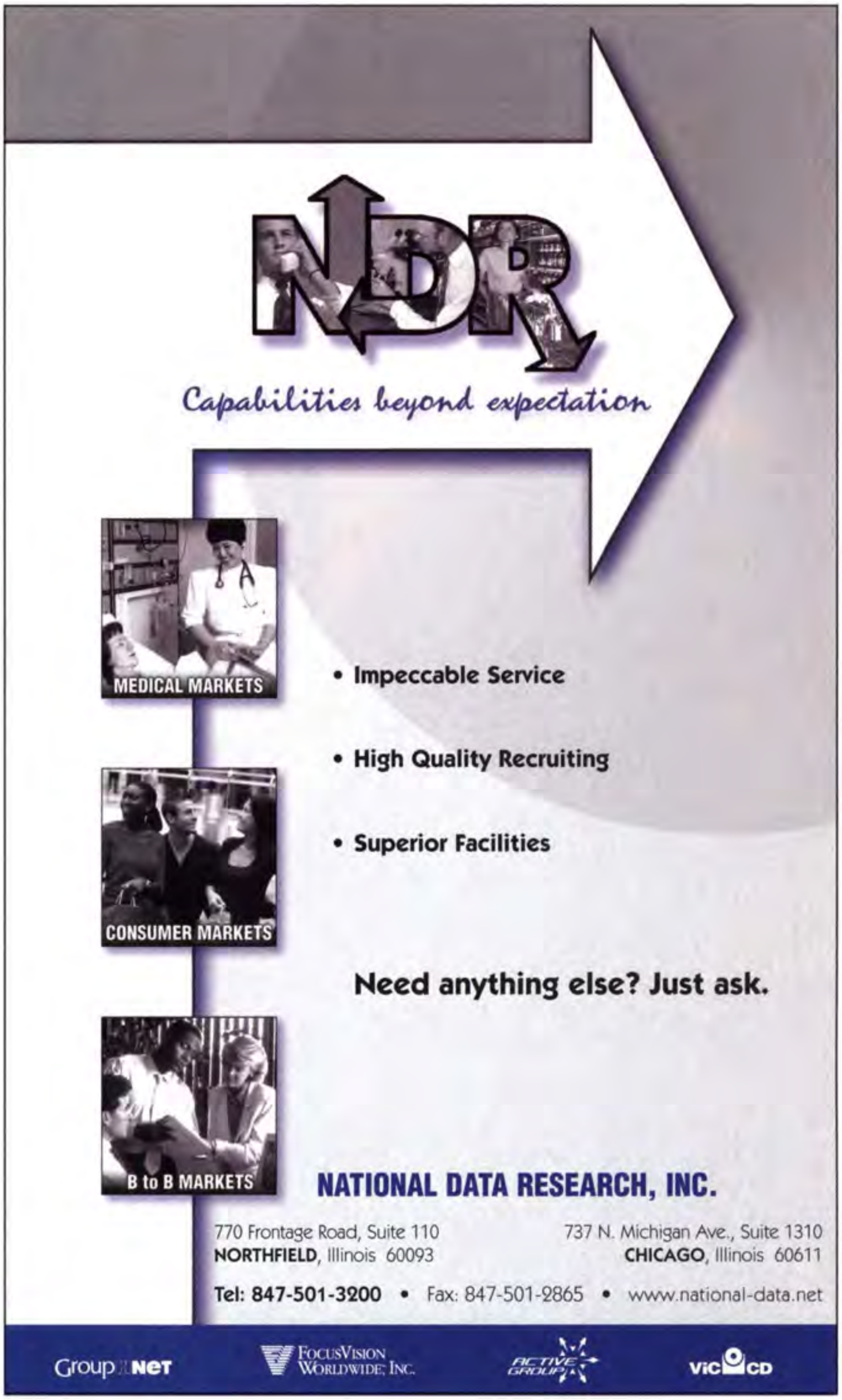
Lost in translation

Since a product launch simulator is based on how doctors will respond to the brand's message, this message

must first be tested. This is usually done by exposing a carefully selected sample of doctors to the brand message via the mail or the Internet. If different messages are to be tested, different groups of doctors are exposed to each message.

After the doctors have read about the new brand, they then answer a battery of scaled questions. These questions include issues such as: How disappointed they would be if the product were not introduced? When would they most likely write the first prescription? How satisfied are they with current brands? What portion of their prescriptions for the medical condition would go to the new brand?

These questions are used when the brand is entering an existing category of products. If the new brand is entirely unique and will start a new category, a different set of questions may be used.



Real-world behavior

The key to building a simulator that will produce excellent forecasts is not as much the questions that are asked, but how the answers are translated into real-world behavior. The inability to translate how people say they will behave into how they will actually behave is a major cause of inaccurate forecasts.

Human beings have a strong tendency to overestimate. When it comes to neutral or positive behavior, not only do we overestimate our future behavior, we also overestimate our current behavior. The degree of overestimation of how frequently a product will be selected depends on how frequently its category is considered.

Consider this example. Assume that doctors say they will give a new brand 20 percent of their prescriptions. Empirical evidence from prescription prescribing data establishes that if they prescribe brands in the category every day, their 20 percent estimate will translate into a maximum potential market share of slightly less than 5 percent. If they only prescribe the category once a month, the new brand cannot achieve even a 4 percent share.

A good simulator will forecast filled prescriptions for a new brand during the first year with an average error of less than +3 percent for the strategic and tactical plan that was implemented. Forecasting errors of even 10 percent should be extremely rare, as the simulators help translate what people say they'll do into what they'll really do.

However, the primary value of a launch simulator may not be the accuracy of the forecast it produces but the marketing efficiencies it reveals. A good simulator will always be able to show a company how to produce better financial results (more sales or less spending, or both) than it would have on its own. After all, if you are in an industry that requires an average of $1.7 billion for each new product, you cannot afford to waste even a dollar because of bad forecasting. | Q

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qualitative research

To be seen or not to be seen — that is the question

By Cara L. Woodland

A look at sponsor involvement in ethnographic research

Which produces a better account of a situation, an eyewitness to the event or a factual third-party objective report? This is a common debate in market research and has become a prominent subject in the study of customer behavior in the customer's natural or "home" environment. This method, called ethnography, is the branch of anthropology that deals with the comparative study of contemporary cultures, acculturation and human ecology. When applied to business research, ethnography involves entering into customers' natural environments to better understand a realistic perspective of their attitudes, behaviors and needs with regards to the product usage.

Ethnographic research has been an accepted method of the social sciences for decades, but more recently, it has made headway as a business research method. Although, it does not replace other parts of the research continuum, it is an excellent tool to better understand the deeper needs of customers and their environmental context. It is used to build beginning hypotheses and is a proven means to develop insight into the customer. Ethnography enables the research team to discover actionable, unarticulated customer needs, understand the emotional side of a product, create hypothetical customer requirements, develop new products, brand extensions and improvements on current products and determine the "real" problems in a complex or multi-system structure.

In the ethnographic research process, a sponsoring company can chose between many forms of involvement. Those forms are:

• Distant participation: Sponsor representatives are involved in the planning of the research process, but do not participate in the remainder of the process until the analysis has been conducted. At this point, the sponsor becomes involved in the implementation of the results.

• Removed participation: Sponsor representatives participate throughout the process, but during the fieldwork are abstract observers of the site visit. The sponsor representative's responsibility is to observe the customer, collect data and possibly ask a question or two of the customer, but a trained ethnographer leads the site visit. The sponsor

Editor's note: Cara Woodland is director, discovery and innovation at Innovation Focus Inc., a Lancaster, Pa., research firm. She can be reached at cwoodland@innovationfocus.com.

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representative may or may not be involved in the analysis of the research but would be involved in the implementation of the results.

• Evolving participation: Sponsor representatives share equal responsibility with a professional to design, manage, conduct and analyze the research. The professional party acts as a coach for the sponsor's team to conduct the research and is partially involved in the analysis of the field data. Again, the sponsor would be involved in the implementation of the results of the research.

• Full participation: Sponsor representatives conduct the entire research process themselves. A professional may only be involved to train and coach the team through the process. If this method is used, it is important that teams are adequately prepared to enter into their customer's world and get the most from their experience.

The question at hand is, what level of sponsor involvement is best in ethnographic research? This is a great debate among anthropologists and market researchers and is where anthropology and market research diverge. In most market research studies, the sponsoring organization is removed from the process in order to help the research maintain an objective perspective. In qualitative research, sponsoring organization representatives sit behind a one-way mirror. In quantitative research, a third-party administers the survey or research tool. Within anthropology, those who implement the outcomes of the research are the ones who conduct the research. Which method is best? There are advantages and disadvantages to all sides.

Figure 1: Advantages and Disadvantages of Sponsor Involvement

Situation	Advantages	Disadvantages	Compromise
Sponsor involvement in the research process	• Higher level of buy-in to the outcomes • Firsthand knowledge and intuition about the customer • More control of the outcomes • Good way to align cross-functional teams • Skills of observation are gained internally	• Potential for company biases to influence the research • Increase in the risk of messing up the research • More time-consuming for internal resources	• Conduct training prior to the research • Have an outside consultant as a coach • Practice site visits prior to the research • Examine personal ad company culture biases • Sponsor to be involved in the research as an observer only
Sponsor non-involvement in the research process	• More objective reflection on the outcomes • An outside consultant may have skills that internal participants do not	• More direct out-of-pocket expenses to the sponsoring organization • Harder to transfer the knowledge gained to the sponsoring organization	• Have the outside consultant give a face-to-face presentation of the outcomes and address questions • Create a video clip presentation to highlight the key points from the research

Source: Perry, Barbara; Woodland, Cara; Mille, Christopher W.; Creating the Customer Connection PDMA Toolbook II for New Product Development. August, 2004. Wiley Publishers.

Advantages of sponsor involvement

There are plenty of good reasons sponsors would want to be involved in the ethnographic research process. Involvement provides more ownership and control in the outcomes. It allows sponsors to hear firsthand the voice of their customers and feel more confident when asked to make decisions based on their customer intuition. It is also an effective way to align an organization and cross-functional team on customer needs. By participating in the research, organizations gain skills that they may not have had before, such as those of observation, intuition and relating to the customer. Last and most importantly, the results of the study are more likely to be implemented if the organization participates. As one researcher has said, "The further a person is away from the research, the more likely they are to discount the results."

Sponsor involvement case study: Rubbermaid office products

Rubbermaid manufactures office products such as pencil holders, stackable letter trays and plastic file folder sorters. The product development team decided to explore the use and expansion of their products through ethnographic research.

A rabbi, a priest, a plumber, four housewives and a CPA walk into a room. You bet a good moderator is important.

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In order to gain the most value, Rubbermaid decided, during the research design phase, that they needed to conduct the research themselves. Since ethnography was a new research method for the team, extensive time was spent coaching and training the team. Coaching included classroom work, practice site visits and support during the actual fieldwork. "Being involved in the research allowed me to experience the customer firsthand, to see how our products are used and determine if the behavior described is how it actually plays out in real life. A report about the fieldwork would not have done the research justice," says Danyelle Cash, former Rubbermaid product manager and team member.

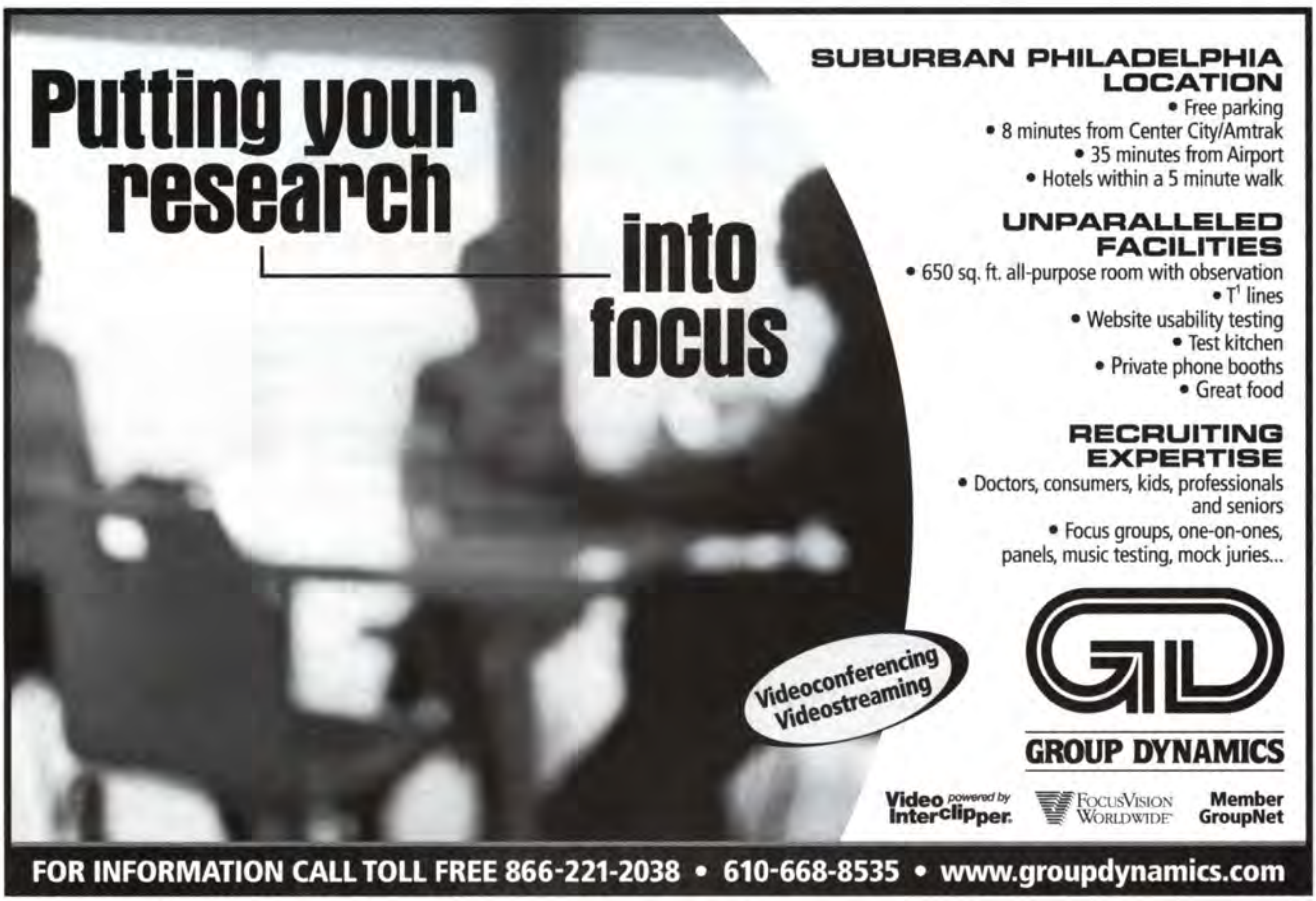
Disadvantages of sponsor involvement

On the other hand, there are valid reasons for not having the sponsor participate in the research. As with any inexperienced team using a new research method, it will make mistakes during the research that could be an embarrassment to their organization, the industry and hurt the integrity of the research. One example from experience includes the sponsor representative who commented on a customer's weight loss program. In other instances, clients have phrased questions in order to lead the customer to a specific response, tried to sell their products while with the customer or made very broad assumptions and conclusions about a customer from a limited perspective during the debrief. These kinds of occurrences alienate the customer, damage the research and reflect poorly on other team members.

An advantage of using outside ethnographers is that they have been trained in the skills needed to conduct and analyze the research. These skills of observation, association and knowledge of the field take years of practice, study and experience to acquire. An outside professional brings less departmental and organizational bias into the research. With this experience and objective perspective, the professional provides a higher level of insight and the reported results are less likely to be skewed.

A compromise

If the sponsoring organization does participate in the research, it is important to spend a large amount of time identifying individual and organizational biases before participating in the research. Team participants in ethnography from one sponsor said, "I like the fact that it was explained how biases will affect all of our insights and methods to distinguish between insight and observation... We'd be crazy if we didn't keep an open mind when talking with customers, thinking about what they are saying and doing versus how we are used to thinking of things." The common biases sponsoring organization representatives face tend to be a self-projection on the cus-



tomer, gravitation towards people like themselves, a natural tendency to want to change the customer, assumption that the sponsor representatives are not biased and the common comment of, "But that isn't my customer..." Unfortunately, the majority of biases do not become apparent to team members until they are in the field. For this reason, many organizations choose to have an outside ethnographer conduct the research with sponsor representatives participating as observers. Abstract involvement allows sponsoring organizations to have firsthand experience with their customers but also provides the distance necessary to manage their biases effectively.

How to decide what type of involvement is best

As long as sponsoring parties are aware of the advantages and disadvantages of all perspectives, they have the ability to make an informed decision about their involvement. To determine the best involvement level, sponsoring organizations should ask themselves a number of questions.

• What is the purpose of the research? What level of quality or caliber should the research have? What level of buy-in to the outcomes does the sponsoring organization need to have? Who needs to buy in to the outcomes?

• What kind of budget does the sponsoring organization have? How much experience with direct customer interaction does the sponsor's internal team have? What amount of time and money does the organization have to invest in internal skills versus bringing in expert knowledge?

• How will the research be used after it has been conducted? Will it be used to make a decision, for developing new products or advertising themes, or as a reference for the customer market? How important is an archival record of the research?

• How will the results be communicated? Who will communicate them? How will the results be implemented? Who will implement them?

Appropriate level

The answers to these important questions should help direct the organization toward the appropriate involvement level. Whether the sponsoring organization is involved in the research or not, ethnography provides great insight into the customer's world and is a great method to add to the toolbox of customer behavior analysis techniques. | Q

Figure 2: How to Decide How Much Involvement to Have

Situation	Ideal	Second Option
You have the budget but not the time	Use a mixed team of internal and external experts to do the research and independent professionals to handle the management	Use an independent professional
You have the time but not the budget	Use a professional to coach your team to do the work	Use a mixed team of internal experts and independent professionals

Source: Perry, Woodland, Mille, Creating the Customer Connection.

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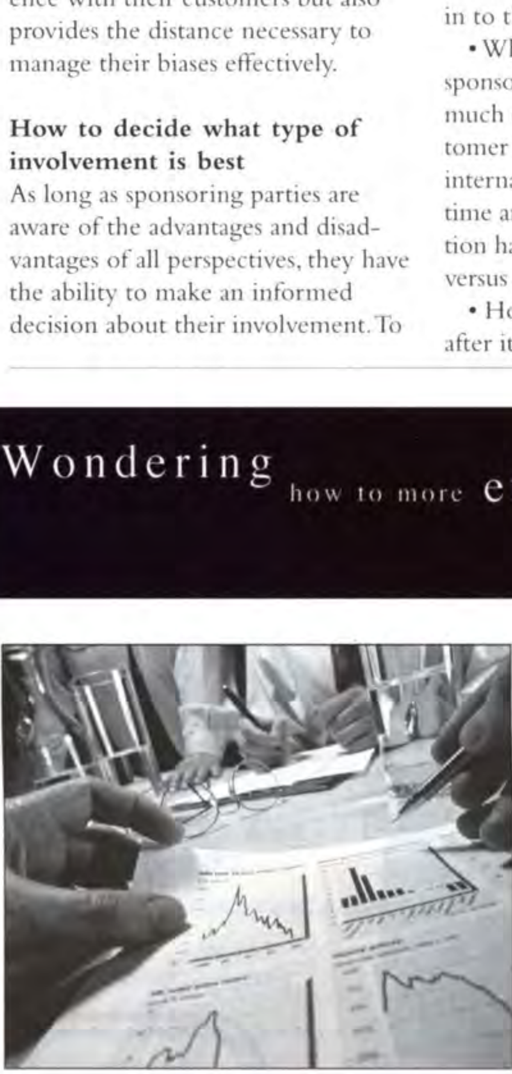

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qualitative research

Change your point of view

By Susan Sweet

Infusing creativity throughout the qualitative process

Gone are the days of wine and roses, literally. The practicalities of conducting qualitative research have changed dramatically, though the need to explore the hearts and minds of consumers has not.

In many cases, clients and qualitative consultants are no longer able to plan and conduct an optimal research design to answer important research questions, let alone enjoy cocktails and fresh flowers in the facility's back room. Budgets have been slashed, researchers are asked to do more in less time, and clients are pushed to reach meaningful conclusions and make recommendations on the spot.

So how can clients and suppliers work together to navigate the new business realities while preserving the richness and direction provided by thoughtful qualitative research? The answer lies in infusing creativity throughout the research process. Clients and consultants must flex their creative muscles to design the best method for the job, execute it imaginatively, employ innovative analysis techniques and design creative deliverables that have real impact for key decision-makers.

Recruit strategically

Hiring the best recruiters can yield experience and advice on finding a difficult-to-reach consumer. Seasoned recruiters will recommend looking outside standard facility databases and newspaper ads to net better, faster recruiting. Consultants who use strategic thinking and contacts to get into the right places often find their target consumer quickly and efficiently.

Go where the target is. While conducting a study about teen and young adult lifestyles, we recruited outside an Urban Outfitters store. This store embodied the type of consumer we needed to reach: edgy but not counter-culture, independent young women who were interested in trends and fashion. In one afternoon, we had more than enough respondents who could then be more thoroughly screened over the telephone by professional recruiters. Similarly, for a high-tech study, we spent a few hours scouring professional journals and Web sites and thereby found the opinion leaders in the industry. By contacting those people and then networking via e-mail and telephone, the study was filled with the precise target: innovators and experts working on the cutting edge of new tech-

Editor's note: Susan Sweet is a senior research associate at Doyle Research Associates, Chicago. She can be reached at ssweet@doyleresearch.com or at 312-863-7607.

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nologies. We've even recruited nervous, first-time moms via OB/GYN offices and maternity shops.

Get out of the group room

Take research out of the standard focus group facility to open both clients' and respondents' eyes to new or hidden truths, as well as to minimize facility costs. Any location where respondents will be most comfortable with the subject matter (e.g., schools, community centers, bowling alleys, bars, parks) will make the discovery process more relaxed and natural for respondents. Clients become part of the process by becoming in-person note takers or camera operators, instead of sedentary consumers of M&Ms. Removing the mirror from the research equation can awaken all kinds of excitement for researchers, respondents and clients alike.

Clients benefit from mixing new research locations and combining methods in a typical study. A national athletic apparel store discovered, by adding in-store observation and interviews to its usual mix of in-facility focus groups, that a few simple changes could make dramatic improvements to its relevance with core consumers. Specifically, the retailer needed more hip, young salespeople (teens don't want to buy fashion from people who remind them of their parents), full-length mirrors (they want to check out the entire look, not just the shoes), and improved promotional displays (they want a brand they can be proud to shop). The mixed methods helped identify the key issues and potential solutions, as well as giving the client team a much-needed dose of reality.

Confront respondents with their actual (vs. reported) behavior to illustrate product issues and insights, as well as help clients understand realities that seem to be in conflict with previous research findings. Observe how consumers interact with "their" brands, in actual home use, and be surprised along with them. In numerous in-home observational research studies, we have watched consumers hold up a bottle of one brand of stain remover, while calling it another (e.g. "I can't live without my Spray 'N Wash" while holding up a bottle of Shout). We have also observed consumers who claim to buy a new bottle of sunscreen each year using brands and packages that were discontinued years earlier.

Customer observation might reveal easy solutions. A toy manufacturer was losing market share in a category it previously dominated, and point-of-purchase sales materials were initially blamed. But in-store consumer observation showed the simple solution was related to the "superior" rubber used in the market leader's tires: the more expensive, long-lasting rubber squeaked on the showroom floors and seemed to signal a product problem to customers. Simple changes were made, and market share levels returned to their previously high levels. In this case, seeing

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Assign homework

A well-designed "homework" assignment gets respondents thinking about the topic prior to the research session and can eliminate barriers of time and place. In addition, it creates a sense of commitment and dramatically increases involvement in your project. Although homework assignments can add to the cost of a project, the rewards usually eclipse the investment.

Photo-journals or video and audio diaries help consumers capture their world as it unfolds each day. Visual collages and storytelling assignments help bring consumers' thoughts and feelings to the surface in a gentle way. Pantry, handbag, closet and garage checks highlight the realities of daily living. All these types of homework assignments bring the consumer world to life on a daily basis for brand teams. In addition to providing rich insights and stimulus for discussion during the research project, homework assignments serve as a great leave-behind, archival piece that client brand teams can use over and over again.

Especially effective with kids, though also useful with adults, is an assignment to bring favorite possessions or products to a group discussion. This provides an easy warm-up, show-and-tell exercise, as well as real-world grounding for future brand and product discussion. And in new product development, consumers can be asked to make existing products (or create new ones) for display and/or tasting.

Consumer field trips give brand teams the opportunity to virtually fan out in a way that even a week of store checks would not allow. Consumers can take advance shopping trips, serve as "spies in the field" to assess retail environments and product or category displays, or conduct their own observations in public spaces. They can be asked to visit client and competitive Web sites and report back on the experiences. When no time for advance homework is available, respondents can be asked to use waiting room time to assess desirability of new products.

Turn analysis on its ear

Since clients are asked to make decisions faster and present results almost immediately after research is conducted, qualitative consultants need to lead the way and enable progressive analysis. One method is to employ "brainwriting" or another form of active listening during the research process, and then analyze the notes in an organized session immediately following the fieldwork.

During the interviews, groups or observation sessions, client team members listen and observe respondents, and take notes on Post-Its. They do not self-censor. Rather, they "brainwrite" ideas, thoughts, questions, concerns, product ideas, observations and inconsistencies, or anything else that occurs to them. Throughout the research, team members post their notes onto larger, flip-

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chart pages taped to the walls of the research facility or meeting location. Depending on project objectives, the walls may be covered with Post-Its in a random fashion, or sorted into predetermined "buckets."

To make optimal use of the findings, involve a diverse project team in every step of the fieldwork and analysis, including a day-long work session immediately following the research. While numerous methods of analyzing the Post-Its may yield a successful result, the key is to use convergent thinking to reach meaningful, actionable findings. In our Team Navigation sessions, we help clients sort the notes and analyze the resulting Post-It groupings based on five key areas: what the group of notes means/what it has in common, how the company or brand is currently (or not) addressing that area, how the consumer may benefit, how the client brand will benefit, and what risks are involved in pursuing that direction. Though customized for each project, the process is generally the same and the Team Navigation session helps build momentum, devise a plan for next steps and gain internal buy-in from a cross-functional team who can fuel faster business decisions.

Breathe life into deliverables

Lively reports and presentations are expected from qualitative consultants and should be the norm. But "lively" and "useful" deliverables can come in many forms. What would a client prefer? Would 50 pages of black-and-white text representing a thorough analysis, or a quick, animated presentation incorporating actual video clips of respondents illustrating the findings be better for a team who has only days to make a decision that will impact millions of dollars? The choice is not always obvious.

Researchers can fall into the habit of creating a traditional deliverable that not only costs more but does not actually meet an individual client's needs. Spend more time understanding how and when a decision needs to be made, and suggest a report format and content to meet that need. In addition, learn who will read the deliverables and what will aid most in decision-making. Is the audience more influenced by verbatim comments or a consultant's informed analysis? Allow the audience, timing and budget to dictate the deliverable options presented, and ensure that client and consultant agree in advance on the desired outcome.

Make it fun

Although the process of designing, conducting and analyzing qualitative research has become more difficult in recent years, successful consultants and clients alike are having as much fun as ever. Enjoyment comes from working together to overcome obstacles, making even old research challenges seem new and interesting, and delivering well-packaged findings that have real business impact. These professionals know that creativity takes work, but the rewards are great. | Q

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The art of camouflage

By Robert J. Relihan and Sharon Seidler

"The shortest distance between two points is a straight line."
"It's always good to be direct; don't beat around the bush."
"Just the facts, ma'am, just the facts."

We've all heard sentiments such as these. And, for the most part, we subscribe to them. Americans are dedicated to the notion that directness leads to speed and efficiency and, therefore, we like to go to the heart of the matter as quickly as possible.

But in qualitative research, taking the most direct route is often not the most efficient and certainly not the most satisfactory strategy.

When designing a flow for the discussion, it's tempting to go for the jugular. Want to learn how people feel about a particular brand of cold cuts? Recruit lovers and rejecters, and ask them what they love and don't love about that brand. It's easy. It's efficient. It's also potentially misleading, boring and devoid of insight.

As the famed architect Eliel Saarinen noted: "Always design a thing by considering it in its next larger context - a chair in a room, a room in a house, a house in an environment, an environment in a city plan."

To charge in and ask directly about the brand or product in question is to behave in an unnatural and self-centered way from a consumer's perspective. Few consumers shop with blinders on. They consider options and this means that they consider the total environment of the product - at the store and at home.

In fact, consumers rarely think of a brand without thinking of its category. The semiotic view that meaning depends on the network of relationships among objects really is borne out in day-to-day conversations with consumers. Their authentic feelings toward and consumption options related to McDonald's require talking about Burger King. Any discussion of Coca-Cola must include Pepsi. If you ask directly about a brand, you rob consumers of the true source of their feelings.

To bring insights to light, keep respondents in the dark

Thus, a smart qualitative study will start broad and contextualize the topic or brand. Going a step further, a good qualitative study will camouflage the specific brand in question so that participants have no idea who is sponsoring the study - at least for part of the interview. We have, in fact, conducted whole studies involving multiple two-hour group interviews in which not one participant knew for sure who was sponsoring the study.

Why is this anything to tout? Is this just a game, or is there real utility to

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Perception Studies June 2004

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Tapping into the PERCEPTIONS & EXPECTATIONS of your CUSTOMERS

These two studies employed only a sampling of Corporate Research International's available evaluation tools. The type of questions for each project determine which tools will be used. As with any market research study, the primary objective is to understand the expectations of the consumer. Perception data is used to more effectively meet those expectations. That data can be gathered and analyzed in several ways:

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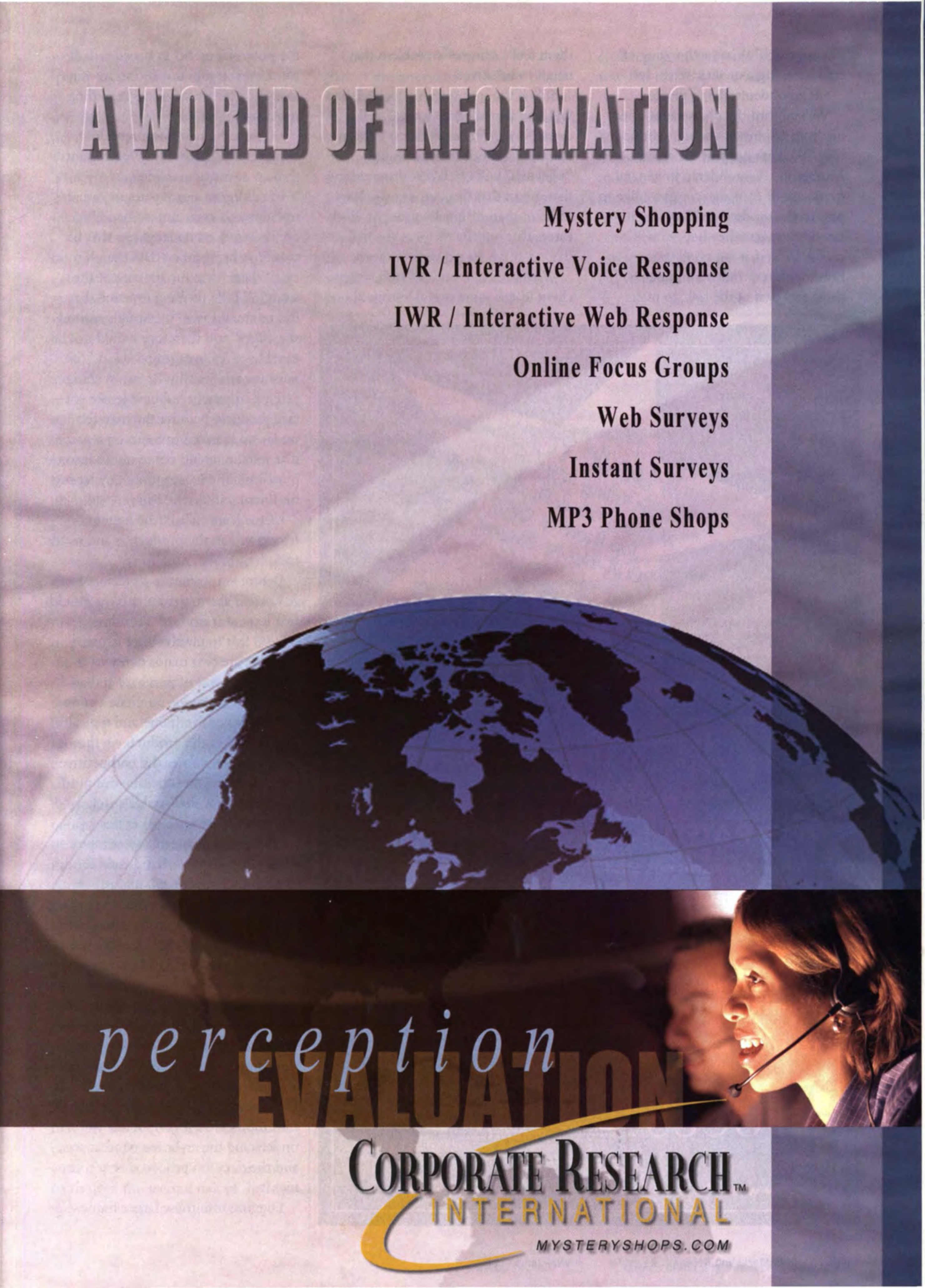

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this approach? What is the value of camouflaging a qualitative study?

• Respondents like to please.

We've heard the phrase about people from Minnesota being "Minnesota nice." Well, it's not just the case in Minnesota. Respondents, in general, (there are of course exceptions) like to play to the moderator. They like to provide answers they believe will be useful. Indeed, it is a good strategy to bond with respondents and make them feel part of the task, to make them feel a sense of a problem that needs to be solved.

Still, if the sponsor is concealed, one will find that alleged "lovers" will come forth with surprisingly critical comments about the brand, and "rejecters" will often reveal something that shows that they are actually less resistant than originally thought. The forces that operate to form the bell-shaped curve are powerful indeed.

What's good about this is that the client learns some useful lessons about the potential cracks in his core dedicated user group, and also some ways to make positive advances regarding rejecters.

• Often, the best, most revealing, comments are "toss away" comments spoken nearly as an aside.

In talking to a group about casual restaurants, a man almost inaudibly commented, while laughing, that he wouldn't bring a first date there (in this case, "there" was the sponsor of the study). A little probing revealed that the restaurant was "too rough around the edges" and therefore would not be capable of encouraging the kind of sensitive relationship he was seeking.

This comment bubbled to the surface precisely because the man felt under no pressure to focus on a particular restaurant and come up with some great insight. He was just a guy letting his unconscious take over.

• One learns about the larger context in which the product/brand needs to function.

Before you examine a product from 5,000 feet above the Earth, you should first look at it from an altitude of 37,000 feet to get the big picture.

There are two major contexts to address: at point of purchase and at home. The point-of-purchase context is the competitive frame and typically includes all of the products on the shelf. But sometimes the competitive set extends beyond the obvious product category. A shelf-stable snack food might compete with other nearby snack foods, but it can also compete with other portable, hand-held foods in general. This can encompass ice cream and yogurt novelties, microwave snacks and mini meals, fresh fruit, etc.

At home, the client's product needs to survive a second kind of shopping trip. When one searches the kitchen stock of food for ideas for dinner, if, for example, it needs to be ready in under 15 minutes and eaten quickly, canned soup, frozen pizza, a cold cut sandwich and microwaved items like Hot Pockets are all going to compete with one another. So it's important to understand the at-home context too, and the decision process that accompanies it.

Digging into these larger frame-

works makes sense because it corresponds to the way consumers think about brand and product choices and reveals aspects that might go unnoticed.

The mechanics are simple

The mechanics of camouflaging a qualitative study are quite simple:

— During the screening process, bury the sponsor's name among competitive names. Continue to bury the sponsor's brand name in all subsequent questions asked about usage or attitude.

— If one is screening for a particular attitude (positive and negative are the most common) toward a new product concept, bury that concept among a few others so that the person does not know which one is the true focus. Create competing concepts that are plausible and beware of the potential participant who likes or hates everything.

— Label your screeners and other materials in the most general of terms. You want the hostess to talk about "the detergent study." You don't want a participant to walk in saying, "I'm here for the Wisk group."

— During the interviewing process, employ an inverted pyramid style of interviewing. Go from broadest and most general to most specific. If, for example, you are investigating a particular brand of sliced meat or brand of bar soap, bring to the table a full competitive set of products. Some hands-on exercises will quickly reveal where the sponsor's product lies relative to competition. Talk about each of the products, but do not reveal which one is the sponsor. This can't help but turn up something helpful and perhaps unanticipated.

Few can remain cloaked

Having argued for camouflaging a qualitative study, one might reasonably ask: "But how can I conceal the sponsor and still address the sponsor's issues?" Good question. The answer is that few studies can remain cloaked in camouflage from start to finish. But even if one holds back the moment of truth until the second half of the interview, one has gained quite a lot.

Once you move into the "revealed" part of the interview and show brand-specific new product ideas or communications, you can still use the principles from the first "concealed" part of the interview as a kind of backdrop for reality testing. Thus, if you heard even small negative comments about your client's product in the first, camouflaged portion of the study, and now that same person is extolling the virtues of the new product concept, challenge him/her - not in a hostile way, but certainly in a way that points out the inconsistency.

In sum, to "see" your product truthfully, you've got to hide it. To go to the heart of the matter, you've got to take a circuitous route. And to showcase the product or service at hand, you need to bury it in its larger context. If you do this, you will be rewarded with insights that are honest, valid and useful. | Q

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Optimize the brand experience

By Andy Greenfield

How qualitative research can help you compete in a rapidly commoditizing world

Pick a category - any category - and in 2004, you will find that across almost any product or service category you can think of, commoditization is increasing at a rapid rate. And, as commoditization increases, our ability to differentiate our brands in meaningful and relevant ways decreases, as does our ability to maintain or support our price points. And when commoditization strikes, the result is that consumers tend to view all the major players in a product or service category as delivering on primary category requirements at comparable - and acceptable - levels. The result is that, all too often, the primary differentiator between brands becomes price. And under these circumstances, the power of brands - and, thus, their value - begins to be threatened as well. Not an ideal situation for brand marketers, to say the least.

And even categories we thought were relatively immune to commoditization, such as pharmaceuticals, are now rapidly facing the onslaught of multiple competitors, all delivering on primary category requirements at comparable levels.

So what is a marketer to do? Historically most marketers have often focused on two strategies to support and promote their brands - either trying to achieve a product improvement/breakthrough and/or trying to link their brand to a higher-order emotional benefit. Both these approaches are time-tested, smart, relevant ways of attacking the challenge presented by commoditization. However, in 2004, both these strategies are increasingly difficult to count on or implement. Product improvements/breakthroughs are great and can truly make a difference for a consumer. However, they are typically hard to engineer or predict, expensive to look for and implement and, in most cases, are quickly duplicated by competitors. What about the strategy of attaching your brand to higher-order emotional benefits? Well, today these benefits are increasingly harder to find and are launched into an increasingly cluttered media environment against an increasingly cynical consumer. Long gone are the days when consumers could readily be swayed by advertising that suggested that "using the right food wrap will make me a better mother."

Does this mean companies should stop thinking about product/tech-

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nology breakthroughs or higher-order emotional benefits? No. However, it does suggest that marketers need to think about other strategies to compete effectively.

Is the situation really as bleak as it sounds? Absolutely not. There are plenty of opportunities for marketers to increase the differentiation and relevance of their brands if they start thinking more broadly about their brands - and how consumers actually experience their brands. When marketers begin to do this, they will start to see numerous opportunities to do what we call brand engineering. Brand engineering helps marketers optimize the consumer's experience of their brand and increase the brand's perceived differentiation and relevance - two key drivers of brand preference and brand value.

The process of brand engineering - which is inherently qualitative - has three components. First, a brand experience audit (BEA); second, an assessment of which elements of the brand experience are worth optimizing; and third, an effort to "engineer" those elements to help optimize the brand experience.

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Step 1: The brand experience audit (BEA)

In essence, this involves looking through the consumer's eyes to appreciate all the aspects of how the consumer experiences your brand. Here, when possible, we typically employ a wearable video camera, worn by the consumer, which allows us to actually see how the consumer experiences the brand. We then show the consumer the video of his/her brand experience, and interview him/her as he/she reacts to and explains the brand experience. From being made aware of the brand, to shopping for it, buying it, assembling it/learning to use it/using it, through to dealing with or resolving product/service problems, the brand experience audit provides a window into multiple dimensions of the consumer's experience of your brand.

Here are some examples of brand experience across multiple product/service categories - any of which can be discovered through a BEA - and all of which represent meaningful opportunities to improve the consumer's experience of a brand:

- financial services - standing in line at a bank;
- cell phones - using the owner's manual to help set up and configure the cell phone;
- pharmaceuticals - using the directions to help administer an inhaled Rx drug;
- food - opening, using, then resealing a bag of flour, etc.;
- technology - using an automated customer service help line to resolve a problem.

Note two very important things about these examples: first, none of these elements of the brand experience have anything to do with the product or service itself - yet they have everything to do with how the consumer experiences the brand. And second, the vast majority of marketers pay little attention to these types of things.

Step 2: Assessing which elements of the brand experience are worth optimizing

This part of the brand engineering process involves three elements:

A. As you review the brand experience videotapes with consumers, look for elements of the experience that are similar across most category providers; or for areas of category inertia (elements of the brand experience that have changed very little over the years). Focus in particular on elements that are viewed as neutral-to-negative parts of the brand experience.

B. Assess the degree to which you are either competitively advantaged, neutral, or disadvantaged relative to these elements.

C. Determine whether the features of the brand experience you are thinking about are sufficiently salient, so that if they were addressed, the consumer would both notice and care. This is the most critical step.

These three steps can typically be pursued employing focus groups or one-on-ones.

Answers to A, B and C above will provide good guidance for determining whether or not the elements of the brand experience you have identified are worthy of your engineering efforts.

Step 3: Engineering elements of the brand experience

At this point in the brand engineering process, you have looked through the consumer's eyes to appreciate his/her experience of your brand and have identified elements of that experience worthy of your engineering/optimizing efforts. The final step involves engineering individual elements of the brand experience to optimize the consumer's overall experience of your brand. This involves three steps: wishing, stealing and ideating.

- Wishing: This is a relatively straightforward step, which involves nothing more than having the consumer make a wish relative to the brand experience element in question. For example, "I wish it was easier to buy a car," "I wish there was no line at the bank," "I wish the owner's manual was easier to understand," "I wish that I didn't have to sit on the phone for 15 minutes waiting for customer service to give me some help." These wishes can be used to provide direction for the next two engineering activities - stealing and ideating.

• Stealing: This involves identifying and stealing best practices from categories that have successfully dealt with the consumer wishes you are trying to help make come true. For example, if you are dealing with the issue of simplifying complex material (such as an owner's manual), steal from someone who has effectively dealt with the issue, such as the "For Dummies" series of books, or, perhaps to address the issue of standing in a line/waiting, steal from the fast-food industry or airline industry, both of which have developed strategies for dealing with lines or waiting.

• Ideating: Here, you would use the consumer's wish to serve as an ideation springboard. Traditional group dynamics ideation techniques can be effectively used to springboard off consumer wishes, incorporating stolen best practices to help develop tactics and strategies for optimizing key elements of the brand experience.

Proven techniques

The three-step approach detailed above involves the straightforward application of three different qualitative techniques - video-enabled ethnography, followed by one-on-ones/groups, followed by ideation. None of what has been described is black-box - rather, the process involves proven and time-tested techniques that can be employed to help optimize the brand experience and, in so doing, enhance the brand's differentiation, relevance and value - and ultimately, its ability to compete more effectively in the increasingly brutal marketing wars of the 21st century.

But for this process to be effective, it truly requires brand marketers to start thinking more broadly about their products and services and to observe the real world and how consumers are experiencing their brands. | Q

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product research

The shining temple in the customer jungle

By Wade Boudreaux

How value-added research will get you there

Listen very closely because I'm going to answer a question that's probably been on your mind a lot lately: "What will it take for my company to be profitable this year, next year, and every year thereafter?" The answer lies deep in the customer jungle, and to find it you must be willing to navigate the raging rivers and treacherous swamps to reach the shining temple, where its awaits you. Your guide for this journey will be someone very familiar to you: your product. And your weapons will be none other than your eyes and ears.

If your company is anything like mine, then your customers and competition have driven your product(s) down to nothing more than a commodity. If you're one of the lucky companies that sells unique or scarce products, milk it while you can, because your product too will one day be driven down to commodity status. Some of you are probably laughing and boldly stating, "Surely not my product." Yes, your product too. It is an undeniable truth. Customers and competitors will not allow you to continue to make high levels of profitability for an extended period of time. Alternatives will come about. Improvements will surface. If new, alternative products do not make your particular product extinct, then they will definitely push it towards being a commodity. Why can I be so confident in stating this? Because I for one cannot name a single company that has been around for a long, long time whose core products have not been driven toward commodity status. Look at the automobile industry, the soft drink industry, the hotel industry, the microchip industry, and the pharmaceutical industry - heck, pick any industry. They all have one thing in common, and that is all of their core, longstanding product lines have been pushed to commodity status over time.

So, you might ask, if this is the case, why can some products still command a higher price for the same basic product? Say, for instance, laundry detergent. Why would Tide still be a market leader and charge more than other brands? The answer, in my opinion, is that they've been to the jungle, probably more times than many, and reached the shining temple where the answers to profitability awaited.

So let's uncover the mystery of the temple. The temple represents the results of value-added research. Value-added research involves trail-

Editor's note: Wade Boudreaux is director of marketing at Danos & Curole, a Larose, La., marine contracting company. He can be reached at wadeb@danos.com.

Creating Connections

In this high-tech world, it's easy to forget that face-to-face interaction is still one of the best ways to learn about people's experiences and impressions. Even though technology is playing an increasing role in data collection, we know it will never replace direct conversations with customers in a focus group setting.

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ing your product into the realm of the customer (the jungle) and observing. Watch how your customers physically use your product, what difficulties they have in using it, how it interacts with other products they use. While you're there, also take a look at what other difficulties they have, what tasks or duties make their job harder, what types of needs are not being met. The simple, basic thing that you want to know is "where is the pain" in your customer's operations? The customer knows where the pain is, but what he/she doesn't know is how to alleviate it. Even if the customer does alleviate it, it may not be the most efficient or cost-effective way. The customer knows he's spending too much time on "A" when he should be spending more time on "B." It's your job to figure out how to alleviate that pain, and translate it into a separate product or service that accompanies your core product. And that's how you create value for the customer. This value will always be something that the customer is willing to pay for, because you can easily show him/her how it will take away their pain, save them time, and, most of all, save them money. If the customer is not willing to pay for it, then scrap the idea because what you have is not a value-added product but rather a free service. Free services are nice and customers tend to like them, but they can cut down your profitability tree quicker than a champion lumberjack.

Many routes

Once you've made the decision to enter the jungle, there are many routes to follow. Some of the methods that can be used to conduct value-added research are listed as follows.

Total process observation

This is by far the best method in my opinion. With this approach, the researcher actually physically follows his/her product from when it is first distributed to after the customer uses it. Look for how the product arrives, how it is handled, how the customer uses it, what problems accompany its use, what other products are required for the customer's specific application, and so on. For the best results, the researcher should follow the same product a number of times to many different customers using all applicable distribution methods. The data will usually be in the form of note-taking or voice recording, which can later be transcribed.

Depth interview

A simpler but less effective method is to actually sit down with the customer and ask him/her a series of open-ended questions that will try to determine how the customer interacts with your product. Questions should probe for problems with using the product, difficulties with competitors' products, what is causing the customer the most pain in dealing with your product or company, what are other services that the customer wishes were being provided, what does the customer physically do when he receives the product, and so on. As with total process observations, the data will be in the form of note-taking or voice recording.

Paper/online surveys

An even simpler but much less effective method is to send a survey, although the incentive for the customer to fill it out should be a very nice one (try a $100 gift certificate to a fancy restaurant vs. a $1 bill). Remember, you are asking the customer to respond to open-ended questions, so he/she will probably want to be rewarded substantially for the time they spend thinking and writing. The questions on this survey would be like the ones mentioned in the depth interview section.

Some savvy value-added researchers have actually gotten surveys/interview tools down to one or two questions that tell them everything they need to know. For instance, a financial institution might ask customers to describe their ideal banking experience and describe what services they would most like to see their bank offer. And as trends emerged over time by asking these two simple questions, they could truly offer value-added services that their customers were willing to pay for.

So, what does value-added actually look like? It will usually be something that costs you little to provide, but exponentially enhances the value of the core product. Many value-added products or services may surround one core product. Value-added is the personal, face-to-face consulting and neighborhood location that goes along with Edward Jones investment services. It's the extreme levels of service you receive at a Ritz-Carlton hotel. And it's the non-spill spout on the top of a laundry detergent bottle.

Let's look at an example of value-added that may have been created from conducting a total process observation. Say you sell outdoor


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The global leader in analytical research systems flashlights, mainly used for hunting. Watching a customer purchase a $20 flashlight (which costs you $10 to make), you may observe the customer do some of the following things: 1) purchase batteries for the flashlight and put them in; 2) wrap the flashlight in camouflage tape if he is going to use it for hunting; 3) buy a holster or other device to put it in to attach it to his belt; and 4) buy or make a device that can be used to attach the flashlight to a tree or hunting stand.

Now, let's assume that all the additional products the customer used to supplement the flashlight plus the customer's time to do so was valued at an additional $20. What if your flashlight included batteries, was already camouflage in color, and came with a holster and a device to mount the holster to a tree or tree stand? Let's also assume that your flashlight company has a product alliance with the companies that made the batteries, the holster, and the tree-rigging device. What if all these additional products and features cost your company about $5 extra and now you sold the flashlight and accessories for $35 and sales were just as good or even greater because your product had all these additional features that customers wanted anyway but had to go though the hassle of putting the complete package together themselves? Many hunters might be happy to pay $15 more for a flashlight with all the accessories they need in one nice package for what they perceive to be a minimum of $20 worth of extra value. And the real beauty is, your profitability just went from 100 percent to 133 percent because you provided added value for the customer.

In the above scenario, we see a core (commodity) product being given new life with ancillary products that make the whole package worth more than the sum of its parts. Notice that all the auxiliary products can be standalone (commodity) products themselves, and this is the case with most value-added products and services that surround core products.

If you only remember one thing about this article, it should be that core products will never continue to make you high, sustainable levels of profit over the long haul. Even value-added services that accompany the core product can turn into somewhat of a commodity product over time - look at General Motors' auto financing, which was the definition of a value-added product many years ago. It still is, but not to the extent it was when it was first offered now that other car companies are offering credit financing as well.

Make that journey

Companies must continually make that journey through the jungle, watching intently and asking the right questions along the way. They must routinely add supplementary products and services to their core products, quantify the value, and add it to the base price. The more true value-added services there are, the more profit the company will rake in for each product line throughout the product lifecycle. Many companies attempt to accomplish this, but fail because they believe that they can provide the answer without making that difficult journey into the jungle. Many companies actually do develop some very creative products or services that accompany their core products, and many are well liked by their customers. The only problem is that while the customer likes them, they may not be willing to pay for them, and thus they actually have little or no value at all.

Yes, ultimately you must be the one willing to go and find the answer, but make sure you go to the right place to find it. If you don't make that trek deep into the heart of the customer's business, you risk the chance of raising costs without any return. So, roll up your sleeves, put on your hiking shoes, grab your product by the hand, and let it lead you to that shining temple in the jungle, where the true answer to the riddle of product, service and business evolution lies. | Q

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Sports Participation Topline Report. SGMA International is the global business trade association of manufacturers, retailers and marketers in the sports products industry. Listed are the top 30 sports activities and recreational endeavors in the United States, based on participation in 2003.

This information has been abstracted from the annual Superstudy of Sports Participation conducted by American Sports Data, Inc., which monitors 103 sports and fitness activities. SGMA International's Sports Participation Topline Report is available at www.sgma.com.

Sport/Activity (This information is based on participation numbers in 2003)	# of Participants Aged 6 and above (In millions)
1. Bowling	55.0
2. Treadmill Exercise	45.6
3. Fishing (Freshwater - Other)	43.8
4. Stretching	42.1
5. Tent Camping	41.9
6. Billiards/Pool	40.7
7. Day Hiking	39.1
8. Fitness Walking	37.9
9. Running/Jogging	36.2
10. Basketball	35.4
11. Dumbbells	30.5
12. Weight/Resistance Machines	30.0
13. Hand Weights	29.7
14. Calisthenics	28.0
15. Golf	27.3
16. Barbells	25.6
17. Darts	19.5
18. Inline Skating	19.2
19. RV Camping	19.0
20. Stationary Cycling (Upright Bike)	17.5
21. Abdominal Machine/Device	17.4
22. Tennis	17.3
23. Ice Skating	17.0
24. Soccer (Outdoor)	16.1
25. Horseback Riding	16.0
26. Fitness Swimming	15.9
27. Hunting (Rifle)	15.2
27. Saltwater Fishing	15.2
27. Target Shooting (Rifle)	15.2
30. Softball (Regular)	14.4

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Youth marketers foresee more in-school advertising

A survey of professionals working in youth-related fields shows that although youth marketers don't necessarily see marketing to children during school time as important, 74 percent of them expect to see the level of advertising in schools rise in the future. Results of this poll indicate that: 64 percent feel that reaching children during school time is not very or not at all important; 20 percent feel that reaching children during school time is somewhat important; and 16 percent of respondents feel that reaching children during school time is extremely or very important.

These are some of the findings of the Harris Interactive/Kid Power Poll ofYouth Marketers conducted online by Rochester, N.Y.-based Harris Interactive in February 2004 among 878 individuals working in youth-related fields. Survey participants included professionals in youth marketing, market research, advertising/public relations, media, education and at non-profit organizations. The poll covered a number of topics regarding commercialism and youth, marketing in schools, youth obesity, and sexual and violent content in media.

"The media world has fragmented, and many marketers see schools as a way to effectively reach children and support education at the same time," says Candi Schwartz, managing director of the Kid Power Exchange. "The poll shows that some in-school marketing tactics are seen by youth marketers as much more appropriate than others."

Individuals working in youth-related fields feel that the following are appropriate ways to reach children in school environments: 84 percent feel that sponsoring school sports competitions is appropriate; 83 percent say loyalty programs that reward schools for gathering product labels are appropriate; 77 percent feel that purchasing sports equipment for the school with brand names on them is appropriate; 73 percent say advertising in school newspapers is appropriate; 65 percent feel that outfitting school sports teams with gear on which corporate logos were placed is appropriate.

Examples of inappropriate school marketing tactics included: advertising on school buses (69 percent say this is inappropriate); advertising on school book covers (65 percent); providing instructional material that integrates brand names and products into the lessons (61 percent); in-school location media, which show upcoming events at the school as well as advertisements (54 percent).

Establishing vending contracts in schools, which has become a hotly debated topic nationally, is viewed as appropriate by 46 percent of marketers and other youth industry professionals surveyed, and inappropriate by 54 percent.

"Of all the subjects this poll covered, marketing in schools was the one that seemed to elicit the most disagreement among our respondents," says John Geraci, vice president of youth research at Harris Interactive. "Some feel that schools should be a safe haven from advertising, while others see in-school marketing as providing needed funds to save school programs. Respondents were split as to whether the benefits schools receive from in-school marketing programs outweigh the negatives."

Additional findings from the study include:

- More than half of those surveyed (58 percent) feel that decisions regarding advertising in schools should be left up to local school officials and school boards.
- 47 percent feel that schools should be a protected area and that there should not be advertising to students on school grounds.
- 45 percent feel that today's young people can handle advertising in schools.

"There are two forces coming together that will lead to increased school marketing in the future," says Geraci. "First, school funding situations have become an ongoing challenge. District leaders are pressed to find alternative funding sources for any program that isn't core to the educational mission of the schools. Second, youth marketers are seeking alternative media to reach young consumers. As long as it is done in good taste and with appropriate tactics, we see educators as supporting an increased corporate presence in schools." A summary of the results of this poll is available at www.harrisinteractive.com/news/newsletters_k12.asp.

Pharmacists fear drug re-importation

American pharmacists estimate that they have lost 10 percent of their business to Canadian pharmacies, and most expect that loss to increase substantially, unless the government limits drug re-importation. According to a new Event Flash poll conducted by NOP World Health, East Hanover, N.J., one-third of uninsured patients who compare prices when buying drugs tell pharmacists they will fill their prescriptions through Canadian pharmacies, usually via the Internet.

The study shows that a small proportion of pharmacies - usually independents, rather than chains - are trying to compete with their less expensive Canadian competition by negotiating prices with customers. The American pharmacies usually will not discount prices, however, by more than 10 percent. When faced with complaints about high-priced drugs, pharmacists are most likely to suggest that patients contact their doctors to get prescriptions for less costly alternatives.

Patient concerns about price vary by drug class. Cholesterol and hypertension are the most price-sensitive categories - and the ones most likely to spur discussions about cost between patients and pharmacists.

"The trend toward purchasing prescription products through Canadian online pharmacies is growing - and may become a serious threat to American drugstores," says Andrea McDonough, senior director of market events at NOP World Health. "According to the Roper Reports Market Pulse - conducted by our sister company, NOP World Consumer - while just 6 percent of Americans acknowledge buying their drugs outside the U.S., three out of four believe people should have this option, and two out of three are willing to consider it for themselves."

Even though two-thirds of pharmacists believe re-importation will lead them to lose increasing amounts of business, less than half want to see laws preventing U.S. citizens from buying drugs outside the U.S. The vast majority, however, would like to see purchasing prescription drugs over the Internet better governed.

The survey was conducted March 17-26, 2004, via the Internet, with 175 pharmacists employed at U.S. pharmacies - 117 at chain pharmacies and 58 at independent pharmacies. All participating pharmacists reported having at least three customers in the last 60 days who said they would get their prescriptions filled elsewhere

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Americans unaware of biodegradable plastics

Many consumers are unfamiliar with biodegradable plastics, according to a survey by New York-based FIND/SVP's Guideline Research division. The survey of a representative group of online consumers also found that about 36 percent of participants have never purchased biodegradable plastics products despite knowing about them.

The survey suggests that there is an opportunity for biodegradable plastics makers to educate a significant percentage of the population about "green" packaging in the U.S., says Raye Hazan, a senior consultant for FIND/SVP Inc. who commissioned the survey and discusses the market in detail in her Trend Report titled, "Biodegradable Plastics: Here Today, Gone Tomorrow."

The study found that 28 percent of people surveyed have never heard of biodegradable plastics. Conversely, 36 percent of respondents said they had heard of the products, and purchased them. In addition, the study found that nearly two-thirds of the respondents said they would purchase products in biodegradable plastics but only if they were priced the same as traditional plastics packaging.

"A general lack of awareness regarding the environmental benefits of biodegradable plastics is a major obstacle facing this industry," Hazan says. "Nevertheless, consumer awareness could be heightened by providing an understanding that biodegradable polymers clearly contribute to energy conservation and reduce carbon dioxide emissions."

To be sure, results of the survey suggest that, with consumer acceptance, proper promotion and a ready supply of resources, the biodegradable plastics industry has a number of opportunities to grow exponentially. "U.S. acceptance and promotion of biodegradable plastics could send the whole industry into overdrive," she says. "But only if consumers buy into the environmental impact of plastics beginning as renewable sources and ending as 100 percent recyclable or compostable products."

The survey, conducted in February 2004, was administered via the Internet among a nationally projectable sample of more than 1,000 randomly selected adult consumers. Results of the survey were assessed in one of FIND/SVP's monthly Trend Reports for clients. For more information visit www.findsvp.com/insights/trendlines.cfm.

The smell's the thing

Most products available to consumers now come in a variety of scents. In a recent CARAVAN omnibus study, Opinion Research Corp., Princeton, N.J., asked 1,026 Americans how important the fragrance of a product is in the decision to purchase it. At least half of the population finds the fragrance of the specified products to be very or somewhat important in the purchase decision process for soap or body wash (77 percent), deodorant (76 percent), candles (74 percent), shampoo or conditioner (71 percent), laundry detergent (65 percent), and dish or dishwasher detergent (49 percent).

In fact at least one-third of adults find the fragrance of all of these products, except dish or dishwasher detergent, to be very important. Similarly, younger adults are more likely than those 55 years of age or older to find the fragrance of five of the items (everything except dish or dishwashing detergent) to be very or somewhat important. Gender doesn't play as much of a role as one might think when it comes to the appeal of fragrance. Females are more likely than males to value fragrance for only three of the products tested - soap or body wash (80 percent vs. 74 percent), candles (79 percent vs. 67 percent) and shampoo or conditioner (76 percent vs. 65 percent). For more information visit www.opinionresearch.com.

Study shows how reach the rich

They earn an average of $360,000 a year, their net worth averages nearly $3 million, and they control 70 percent of the private wealth in the country. These are the people in the wealthiest 10 percent of all U.S. households. What gives them the most pleasure in their lives? Spending time with family and friends, according to the latest semi-annual Survey of Affluent Americans, conducted by the American Affluence Research Center (AARC), Pinecrest, Fla.

In many ways, the affluent are not so different from other Americans. "How different are they when the stores where they shop most frequently are Home Depot, Target and Costco?" says Howard Waddell, director of AARC.

The national survey of 376 affluent men and women shows that the affluent expect to increase spending for domestic vacation travel, charitable contributions, home furnishings, entertainment and casual dining-out in the next 12 months. However, their spending for photographic equipment, collectibles and personal luxury items is expected to drop.

The survey also found that:

• Of 25 non-news magazines listed on the survey questionnaire, the most likely to be read by affluent men are *Travel & Leisure*, *Architectural Digest*, *Forbes* and *Fortune*. The magazines women are most likely to read are *Bon Appetit*, *Travel & Leisure*, *House Beautiful* and *InStyle*.

• In addition to spending time with family and friends, participating in favorite leisure activities, discovering or learning new things and having the respect of others give the affluent their greatest pleasure.

• The ways that the affluent learn about new products depend on what those products are. Conventional advertising has been significantly more effective for home products while word-of-mouth, print articles and the Internet have been more effective for resorts and travel destinations.

Additional highlights from the survey can be found at www.affluenceresearch.org.

Young, English-speaking Hispanic adults embrace investing

A study from New York-based Scarborough Research found that young, English-language-dominant Hispanics are 29 percent more likely than all Hispanic consumers to live in households that have financial investments. Conversely, Hispanics ages 45+ who primarily speak Spanish are 18 percent less likely than all Hispanics to live in households that invested.

The Scarborough study analyzed 28,000 Hispanics in the 25 local U.S. markets most densely populated by Hispanic consumers. The report found that almost half (46 percent) of English-language-dominant Hispanics ages 18-44 (who account for 29 percent of all Hispanic consumers in the study) live in households that have some type of financial investment. When it comes to diversification, these investments are spread across a wide variety of services. Twenty-three percent have stocks or stock options (they are 34 percent more likely than all

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Hispanic consumers to live in a household that has made this type of financial investment). Twenty-two percent have mutual funds (38 percent more likely), 11 percent have bonds (36 percent more likely), 12 percent have money market funds (26 percent more likely) and 7 percent have a second home or real estate property (18 percent more likely).

Traditionally, older consumers have accumulated the most wealth and represent a lucrative target for financial marketers. This is also true among Hispanics; however those who are 45+ and English-dominant (who account for 11 percent of all Hispanics in the study) are considerably more likely than their Spanish-dominant contemporaries (12 percent of all Hispanics in the study) to make use of financial investments. Twenty-four percent of English-dominant Hispanics ages 45+ live in a household that has used mortgage services during the past year (versus 12 percent for Spanish-dominant Hispanics ages 45+); 15 percent have IRAs (versus 7 percent of Spanish-dominant Hispanics ages 45+); and 27 percent have mutual funds (versus 9 percent of Spanish-dominant Hispanics ages 45+).

Spanish-language-dominant Hispanics ages 45+ are actually less likely than even younger Hispanics to have investments in their household. Over three-fourths (76 percent) of this group has no household investment whereas 66 percent of all Hispanics ages 18-44 (both Spanish- and English-dominant) have no household investment. Slightly more than one-half (54 percent) of English-dominant Hispanics ages 18-44 have no household investment. The non-investment rate of English-dominant older Hispanic consumers is 44 percent, which is relatively low among Hispanics. This group nonetheless provides much opportunity for financial service marketers as their investment rates tend to lag behind those of the general public.

"Across the board, there are tremendous opportunities for financial marketers to grow business with Hispanic consumers. But lumping together all Hispanics as one homogenous group in a marketing plan is a mistake," says Bob Cohen, president and chief executive officer, Scarborough Research. "Rather, this is a sector of the consumer marketplace that has complex segments within itself. The key to successful marketing is developing an understanding of the generational orientation, language usage, acculturation patterns, lifestyles and media preferences that exist among the many segments of Hispanics consumers.

"As we see in the study, younger, acculturated Hispanics are likely consumers of financial investment products whereas their older, less acculturated parents are more likely to practice more traditional financial management, including forestalling spending and saving for retirement," says Cohen. "At the same time, with at least half of Hispanics in each segment reporting that they have no investments, we can see that there is room to grow these services with both the likely and unlikely Hispanic investment consumers."

"There is obviously an opportunity to create programs that target the younger Hispanic investor," says Alisa Joseph, vice president of advertiser/marketer services, Scarborough Research. "But financial services marketers will also benefit from establishing relationships with older Hispanics - even the Spanish-dominant segment. For example, with the right messaging and benefit offering, marketers can educate Hispanic consumers about the value of investing as a way of making one's savings grow and the empowerment that can come with full participation in the economy."

The data for this report is from Scarborough's Hispanic Multi-Market study. The study covers 25 DMAs with significant Hispanic consumer presence, representing 74 percent of U.S. Hispanics. For more information visit www.scarborough.com.

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The data can be derived from Raosoft data-gathering software, any DBF database, ASCII databases, or standard ODBC databases (SQL Server, Access, Oracle, DB/2, Sybase, more). New features include the ability to produce stacked bar charts, which can pivot instantly. Formatting options are extended to support color and plot styles that can be set. The menu interface has been reorganized and extended for greater clarity. EZReport Version 2004 is designed to be a user-friendly and flexible report writer with statistics, and was developed to give non-experts the ability to produce custom reports, and to give speed to advanced users. Reports may be saved as templates for future re-use with different data, printed, exported, or be saved in Adobe PDF format for Web site posting and distribution. Or, end users may take advantage of Raosoft's RapidReport Version 2004 program, which provides default templates that allow them to prepare reports for each variable or question in a preset chart format. For more information visit www.raosoft.com.

New Q Score measures brand attachment

New York-based Marketing Evaluations, Inc./The Q Scores Company is now offering Brand Attachment Q as a new metric for evaluating consumers' emotional attachment to brands and services. Brand Attachment Q is an enhancement of the company's Product Q service, and will utilize a new rating scale to measure consumers' emotional connection to brands.

Product Q summarizes a variety of consumer perceptions and feelings into a likeability measurement. Brand Attachment Q will take the concept of liking particular brands to the next level, and determine why consumers love particular brands.

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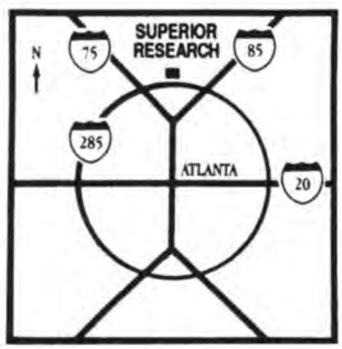

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committed to its brands, as well as competitive brands. As a company aims to define how large its customer base is, and understand what turns those consumers on or off, Brand Attachment Q offers insight into how to deepen the connection to various brands by turning likers into lovers. Additionally, when companies understand what drives consumer involvement with competitive brands, Brand Attachment Q provides assistance in developing strategies to lure customers to its own brands. For more information visit www.qscores.com.

Scarborough enhances PRIME NExT; adds genre viewership info

Scarborough Research, New York, has enhanced its proprietary data analysis software, PRIME NExT, with the addition of two new capabilities: mapping and quick view reports. Both features are designed to save time for the user and create presentation-ready sales and marketing materials featuring Scarborough market penetration information, demographic data, media analysis, and product and retail category insights.

The new mapping capability enables media professionals and marketers to understand consumer phenomena visually through the production of custom digital maps. With mapping, PRIME NExT users can create maps illustrating local and regional consumer and media audience behaviors. These maps can easily be incorporated into reports and presentations. The mapping function utilizes Microsoft MapPoint to enable users to develop sales pitches and marketing strategies.

Separately, Scarborough has added television program genre viewer information to its syndicated study. Beginning with the first release of the 2004 Scarborough database, qualitative information about consumers who watch different types of programs – from the many versions of reality (dating, game shows, documentaries, adventure, talent, etc.) to music videos and local news – is now available to help television stations, cable systems and marketers target their audiences and customers. Scarborough also added new measurements in the insurance, sports, retail, Internet and lifestyle categories of its questionnaire. For more information visit www.scarborough.com.

Measure sponsorship effectiveness with Dynamic Logic product

Dynamic Logic, a New York research firm, has launched AdIndex Sponsorship, a new product designed to help advertisers measure the effectiveness of sponsorship initiatives that aim to link a brand to a particular activity, event or content. The new research application will also help advertisers evaluate the impact of sponsorships on consumers' perceptions of the brand as well as their intent to purchase or engage in a particular activity.

AdIndex Sponsorship will help sponsors answer the following questions: Did the sponsorship successfully link the cause, activity or content to the brand? Did consumers feel that the sponsorship and the brand were a good fit? Did the sponsorship increase brand favorability and purchase/behavior intent among the target audience?

The specific contribution that a sponsorship can add will be measured through AdIndex Sponsorship using a control/exposed methodology, which isolates the effects of the sponsorship from other activity (online and offline media, PR, etc.). For more information visit www.dynamiclogic.com.

New facilities

Precision Research Inc. has opened a new research center near Chicago's O'Hare airport. The 12,000-square-foot facility features four focus suites and a commercial test kitchen with natural gas and ample electric. The address is 999 E. Touhy Ave., Suite 100, Des Plaines, Ill., 60018. Phone 847-390-8666. Web www.preres.com.

Flake-Wilkerson Market Insights, Little Rock, Ark., has opened a new call center in West Little Rock. The center, operating under the name Flake-Wilkerson Market Insights Midwest, LLC, will bring an average of 11 full-time jobs to Arkansas and 167 part-time jobs. The call center will conduct customer satisfaction research for Qwest Communications.

Briefly

Houston-based Promark Research Corporation is now implementing Voxco Interviewer VCC (virtual call center) software in all of its call center data gathering operations.

Natick, Mass.-based Sage Research, Inc. has launched Sage Market Pulse, a technology research service offering a free weekly e-mail alert that delivers data to subscribers on a variety of current technology topics. Each week, Sage Research asks a question of the Sage Panel, Sage's proprietary group of nearly 13,000 qualified technology decision makers, and delivers the answer to subscribers with an illustrative chart. Subscribe at www.sageresearch.com/pulseregister.htm.

WebSurveyor Corporation, Herndon, Va., has introduced a new service to help people build online versions of their paper-based surveys. With this new service, WebSurveyor gets organizations started on their online survey projects by converting their existing paper surveys into Web surveys. Once a paper survey is converted, the customer maintains complete control of it. Using WebSurveyor, they have the ability to modify the survey, send out e-mail invitations, receive data and analyze results. For more information visit www.web-

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Jackling, chairman of the BMRA. "Looking forward, we expect the domestic market to hold up well at least until the next U.K. general election. However, we remain cautious with our forecasting for international work. Continued sterling strength, uneasiness about global security and speculation about the 2004 U.S. presidential election results may dampen spending among some of the multinationals."

A cautious approach to forecasting the future of the international sector is reinforced by the results of the BMRA's survey, which revealed a decline in the international market (comprising 21 percent of the market) by 5.6 percent on the previous year. "Obviously, the decline in the international market is disappointing," Jackling says. "However, the improvement in the U.K. market is very positive news, representing a growth of almost 4 percent in real terms. Overall, we anticipate continued growth above inflation in 2004, but it may not be a smooth curve."

Speaking on the general mood of the market research industry, a number of industry figures shared this cautious optimism. "The mood for 2004 is more positive and upbeat," says Stephen Factor, managing director, TNS UK. "But this is against a background where the last couple of years have not been easy. There has been a little more growth - as we came to the end of the year things were picking up. So we are increasingly more optimistic and the mood for 2004 is very positive."

Steve Hales, managing director, Synovate UK, says, "We are optimistic. Things have freed up compared with the beginning of last year. People are looking forwards rather than backwards. We continue to have growth plans and are optimistic about research in the U.K. and Europe."

Cris Tarrant, managing director, BDRC, adds, "It's difficult to plan business at the moment. On the one hand, people are taking a long time to make up their minds and are deferring decisions about projects. On the other hand, there is a lot of 'I must have it now' purchasing. It all points to the schizophrenic nature of the business."

Syracuse University's S.I. Newhouse School of Public Communications will receive a grant from **BIGresearch**, Worthington, Ohio, for the firm's syndicated Simultaneous Media Usage Study (SIMM) data. The grant will be used in Newhouse's media master of science program curriculum.

The grant, valued at $120,000, will allow students the opportunity to illustrate how understanding consumers' media usage patterns can increase the media industry's return on investment in both content and advertising.

On-Line Communications, Inc. has closed its Richmond, Va., call center. In a statement, the company said it found the cost of maintaining its quality standards in the Richmond market too high. On-Line will continue to operate its remaining Midwestern facilities in a hub-and-spoke system and is looking to expand into other Midwestern geographic areas. For more information contact Nancy Hayslett (Arizona) at 800-369-1265, Frank Markowitz (New Jersey) at 800-825-6878 or Ed Sugar (California) at 800-313-1582.

VNU announced in April that the United States District Court for the Southern District of New York has entered a new scheduling order in the antitrust lawsuit by Information Resources, Inc. against VNU's business unit, ACNielsen. The lawsuit was filed in July 1996. The original scheduling order was signed by the court on May 21, 2003. In January of this year, the court vacated the scheduling order because IRI had failed to provide adequate discovery. A trial date of April 18, 2005 has now been set under the new scheduling order signed by the court.

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CBS' *The Late Late Show With Craig Kilborn* incorporated **FocusVision** video transmission technology into one of its new segments, which featured Kilborn interviewing visitors at the MGM Grand Hotel promenade in Las Vegas from his studio in Los Angeles. In the initial four-minute transmission on February 20, the credit "Video Transmission by FocusVision" appeared on the screen while Kilborn quizzed passers-by, challenging them to make him laugh with a funny face. Kilborn, a favorite among young viewers, said to his first interviewee "Hey, you're on FocusVision, that's why you look so cool."

Acquisitions

Research International has expanded its global network with the signing of new associate members **UMG** in the Ukraine and **NOVADIR** in Lisbon.

Germany-based **GfK** has acquired **Decision Shop** in Bosnia-Herzegovina. The new company, which will trade under the name GfK Bosnia Herzegovina, provides ad hoc research services. GfK Bosnia Herzegovina also supplies information services from the ConsumerScan panel.

Separately, GfK has acquired a 100 percent stake in **m2A**, a French firm specializing in veterinary research. GfK had already purchased a 35 percent holding in the French company two years ago, and has now taken over the company ahead of schedule. With a staff of eight, the firm generated sales of EUR 1.5 million in 2003.

Netherlands-based **VNU** has purchased the remaining stake in its two European-based radio airplay-monitoring businesses, **Music Control** and **Aircheck**. Together they represented a total revenue of EUR 6.5 million in 2003.

Music Control is a radio airplay-monitoring business based in Germany and Ireland. Prior to the purchase, VNU owned a minority stake in the company. Music Control operates throughout Europe and in Scandinavia, Greece and Mexico. Its major clients are record labels, recording industry associations and radio stations.

Aircheck is a radio airplay-monitoring business operating in the Netherlands. Aircheck monitors the airplay output of 20 radio stations. Prior to the purchase, VNU owned a majority stake in the company. Both businesses will remain part of Nielsen Entertainment, which is part of VNU's Media Measurement & Information Group.

Alliances/strategic partnerships

Hong Kong research firm **SoHealthAsia** and Seattle-based **Global Market Insight** have entered into an agreement to develop online market research services with medical professionals in Asia. A series of trials for Web-based omnibus services is underway amongst physicians in Hong Kong.

United Research China, a full-service market research company in the People's Republic of China, is the newest member of the **Harris Interactive Global Network**.

Seattle-based research firm **NetReflector, Inc.**, and **Driva Solutions**, a Bellevue, Wash., consulting firm, have formed an alliance to offer a scorecard solution called Agent Performance Management based on customer satisfaction measurement to help domestic and global corporations optimize individual agent and overall contact center performance.

Marketing Systems Group/ GENESYS, Fort Washington, Pa., and **Common Knowledge Research Services**, Dallas, have announced their collaboration to enhance and expand the Your2Cents Online Opinion Panel, which was

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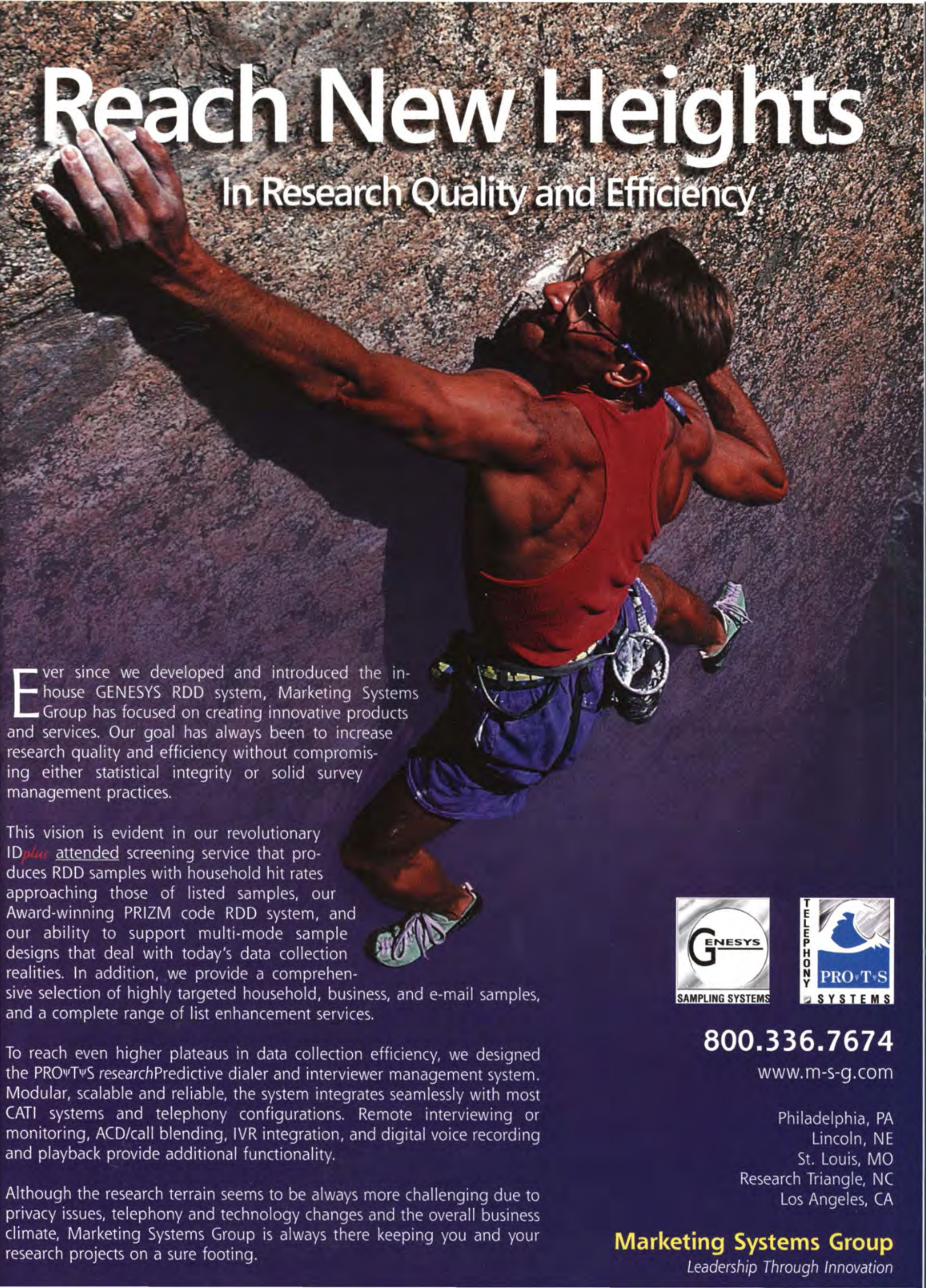
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Association/organization news

The Marketing Research Institute International, Rocky Hill, Conn., has named career researcher Larry A. Constantineau president, succeeding Michael J. Naples. Constantineau will lead the Institute's efforts to grow enrollments in its distance-learning course, Principles of Marketing Research.

New accounts/projects

U.K.-based research firm **ESA** has been retained by Iceland, a U.K. food retailer, to provide mystery shopping services for the third consecutive year. The contract, worth over £160,000, is to monitor the quality of the shopping experience in Iceland's stores and to check availability of products. All of Iceland's 755 stores will be visited on a regular basis by ESA's IQCS mystery shoppers drawn from the company's panel of 3,000.

New companies/new divisions/relocations/expansions

Research Resolutions has moved to 18333 Preston Rd., Suite 425/MB #7, Dallas, Texas, 75252. Phone 214-239-3939. Fax 214-239-3808.

Company earnings reports

The final figures for financial year 2003 for Nuremberg, Germany-based **GfK Group** show that the firm increased its sales by 6.4 percent from EUR 559.4 million to EUR 595.3 million. With an increase in earnings before interest and taxes (EBIT) after income from participations of 38.9 percent from EUR 50.0 million to EUR 69.5 million, GfK improved its margin from 8.9 percent to 11.7 percent.

The GfK Group provides services in its five business divisions: consumer tracking, non-food tracking, media, ad hoc research and the new business division, healthcare, which was set up in mid-2003.

During financial year 2003, the consumer tracking division continued its positive growth trend. Sales rose from EUR 86.0 million to EUR 89.8 million. 6.2 percentage points were attributable to organic growth, with business from the Benelux countries providing the main impetus. There was no acquisitions-related growth. Currency effects reduced sales growth by 1.8 percent.

The non-food tracking division saw a sales increase of 21.4 percent from EUR 137.3 million in 2002 to EUR 166.7 million in 2003, of which 18.0 percent came from organic growth. This was the highest organic growth rate of all the GfK divisions. Acquisitions contributed 6.9 percentage points to the rise in sales. Currency effects reduced sales growth by 3.5 percent.

Despite a drop in sales, GfK increased its operating profit in the media division by 23.6 percent to EUR 7.5 million. The margin rose from 9.9 percent to 12.8 percent, which is mainly attributable to consistent cost management.

Following above-average sales growth in 2002, both organic and by acquisition, GfK's ad hoc research division achieved further organic growth of 1.3 percent in 2003. Growth from acquisitions amounted to 0.9 percent. Operating profit from the ad hoc research division showed an increase of 20.4 percent to EUR 15.4 million (2002: EUR 12.8 million). The drop of 4.1 percent owing to currency effects was offset by organic growth of 22.6 percent. The margin increased from 5.7 to 7.0 percent. Restructuring of business activities in the U.K., Sweden and Italy combined with active cost management and the key account management system for major clients all contributed to this result.

Sales in the healthcare division rose by 37.7 percent from EUR 35.8 million to EUR 49.3 million. The growth was entirely due to additions, primarily the acquisition of V2 GfK on July 1, 2003. In terms of organic

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growth, sales were unsatisfactory with a drop of 17.4 percent. This is mainly due to the fact that Martin Hamblin GfK in the U.K. and Martin Hamblin Research in the U.S. failed to perform as expected. However, by the end of the year, the number of orders and sales growth in these companies had improved. Currency effects reduced sales from this business division by 7.7 percent. Operating profit rose by 25.6 percent from EUR 5.0 to 6.3 million. Once again the newly acquired V2 GfK made a major contribution. With regard to organic growth, GfK recorded a drop of 46.2 percent, mainly due to the unsatisfactory growth in operating profit from Martin Hamblin GfK and Martin Hamblin Research. Currency effects reduced operating profit from this business division by 5.2 percent. The margin was 12.7 percent (2002: 13.9 percent).

For the first quarter 2004, **Arbitron Inc.**, New York, reported revenue of $76.6 million, an increase of 7.3 percent over revenue of $71.4 million during the first quarter of 2003. Costs and expenses for the first quarter increased by 7.7 percent, from $40.2 million in 2003 to $43.4 million in 2004. Earnings before interest and taxes (EBIT) for the quarter were $31.9 million, compared with EBIT of $29.9 million during the first quarter last year.

Interest expense for the quarter declined 32.8 percent, from $3.6 million in the first quarter 2003 to $2.4 million in the first quarter 2004, due to reductions in the company's long-term debt.

Net income for the quarter was $18.1 million, compared with $16.1 million for the first quarter of 2003, an increase of 12.3 percent. Net income per share for the first quarter 2004 increased to $0.57 (diluted), compared with $0.53 (diluted) during the comparable period last year.

In the first quarter 2004, Arbitron reduced its long-term debt by $20 million from $105 million to $85 million.

FIRM (Future Information Research Management) announced record first quarter revenues of $3 million. In the United States the company's first quarter revenues grew by 70 percent (globally the figure increased by 46 percent) for the same period in 2003, delivering profitability.

The increased revenues are the result of increased demand from the market research community for FIRM's Confirmit Survey & Reporting software. The company secured a number of new contracts in Europe, the United States and Asia Pacific and has strengthened its sales forces in all regions.

Rochester, N.Y.-based **Harris Interactive** released its financial results for the third quarter of fiscal 2004. Revenue for the quarter was $35.4 million, up 10 percent versus $32.1 million of revenue for the same period a year ago. This includes $0.3 million in revenue from Novatris, the Paris-based online research firm that Harris Interactive acquired in March. Worldwide sales bookings accelerated at the end of the quarter to set a record high, above the $40 million mark.

Traditional revenue for the fiscal third quarter slid 18 percent to $13.7 million from $16.8 million a year ago. This decline was largely offset by a 42 percent increase in worldwide Internet-based revenue to $21.7 million, or 61 percent of the total revenue for the quarter, versus $15.3 million of Internet revenue, or 48 percent of the total reported for the same period last year. HI Europe Internet revenue for the quarter was $0.9 million, or 14 percent of the European revenue total, sequentially about even with the prior quarter.

Pre-tax income for the quarter was $2.6 million, or $0.05 per share, equal to pre-tax income of $2.6 million or $0.05 per share for Q3 of fiscal 2003. Pre-tax income per share, a non-GAAP financial measure, is calculated as income before taxes divided by the weighted average diluted shares outstanding, and is reconciled to GAAP net income per share in the attached financial summary.

In accordance with GAAP requirements, the company recorded an income tax provision of $997,000 for the third fiscal quarter. That provision, a non-cash expense, produced after-tax net earnings of $1.6 million or $0.03 per diluted share. A tax provision was not booked in Q3 of fiscal 2003, thereby preventing a comparison of net income with a year ago.

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507. Analysis and Interpretation of Customer Satisfaction Data

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Names of Note

continued from page 10

Clare Warren has joined *ORC International* as quality manager.

NOP World announced that **Jim Follett**, COO, will assume overall management responsibilities for its New York-based global operations. He takes over leadership of NOP World from **Simon Chadwick**, who has been CEO of the organization for the past four years. Chadwick, who will be moving on to start a Phoenix-based consulting company, will continue to act as a consultant to NOP World. **Simon Pulman-Jones** has joined NOP World as European director of the Observational & Ethnographic Center of Excellence.

Research International has appointed **Simon Lidington** as CEO of its U.K. company. He will also be joining the company's group board.

Houston-based *Promark Research Corporation* has named **Russell G. Parker** executive vice president.

Calgary mystery shopping firm *Service Intelligence* has promoted **Bill Rimmer** to vice president of information technology and named **Byron McCann** its new president and CEO.

Debra Templeman has been named associate project director at *Sigma Research Management Group*, a Cincinnati research company.

CustomerSat, Inc., Mountain View, Calif., has added **Norman Nie** to its board of directors. Nie was co-founder and long-time CEO and is now chairman of SPSS.

Los Angeles-based *Interviewing Service of America* has named **Peter Cole** manager of customer satisfaction and IVR Services.

Flake-Wilkerson Market Insights LLC, Little Rock, Ark., has named **Donna Kantak** vice president - client partnerships. She will be based in the company's new Atlanta office. In Little Rock, **Farrell Wilson** has been named corporate technology architect. **Kenneth Finney** has been promoted to site director of Flake-Wilkerson Market Insights Midwest as a result of a recent partnership with Qwest Communications. Finney will be responsible for overall operation of the Qwest Customer Transaction Study Center.

Ian M. Fureman has been promoted to vice president at *Integrated Marketing Associates, LLC*, a Bryn Mawr, Pa., marketing research and consulting firm.

WebSurveyor Corporation, Herndon, Va., has named **Mark Pieczonka** director of business development.

Maritz Research, St. Louis, has named **Abhijit Sanyal** director of marketing sciences. He is based in Lexington, Mass.

Alastair Bruce has been named general manager at *Martin Hamblin GfK Inc.*, the U.S.-based office of Martin Hamblin GfK Global HealthCare.

Denny Post has been named chief concept officer at Miami-based *Burger King Corp*. Marketing research will be among her new responsibilities.

Cleveland ad agency *Marcus Thomas* has named **Darlene LaRiche** research associate.

Chicago-based *Research International, USA*, has named **Maria Spinelli** client service director.

New York-based *Scarborough Research* has elected several new members to its Radio Advisory Council. The Advisory Council, formed in 1995, brings together research, sales and marketing executives from radio stations and networks with senior leadership from Scarborough Research and its partner company, Arbitron, Inc. The new members, as elected by Scarborough's radio clientele, are: **Marin Brustuen**, research director, *Entercom Communications*; **Susan De Bonis**, director of research, *Clear Channel Communications*; **Jim Dolan**, vice president/market manager, *Clear Channel Communications*; **Robin George**, general sales manager, *Journal Broadcast Group*; **Todd Kalman**, general sales manager, *Clear Channel Communications*; **Jennifer Potunas**, research director, *Infinity Broadcasting*; **Scott Pritchett**, director of sales, *Clear Channel Communications*; **Jim Ryan**, local sales manger, *New Planet Radio*; **Dick Williams**, vice president/general manger, *Cox Radio*; and **Alicia Woodhouse**, general sales manager, *Disney/ABC*.

David Napior has joined *Mediamark Research Inc.*, New York, as senior vice president of research.

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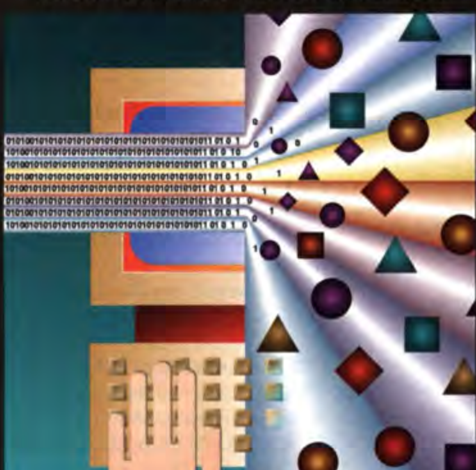

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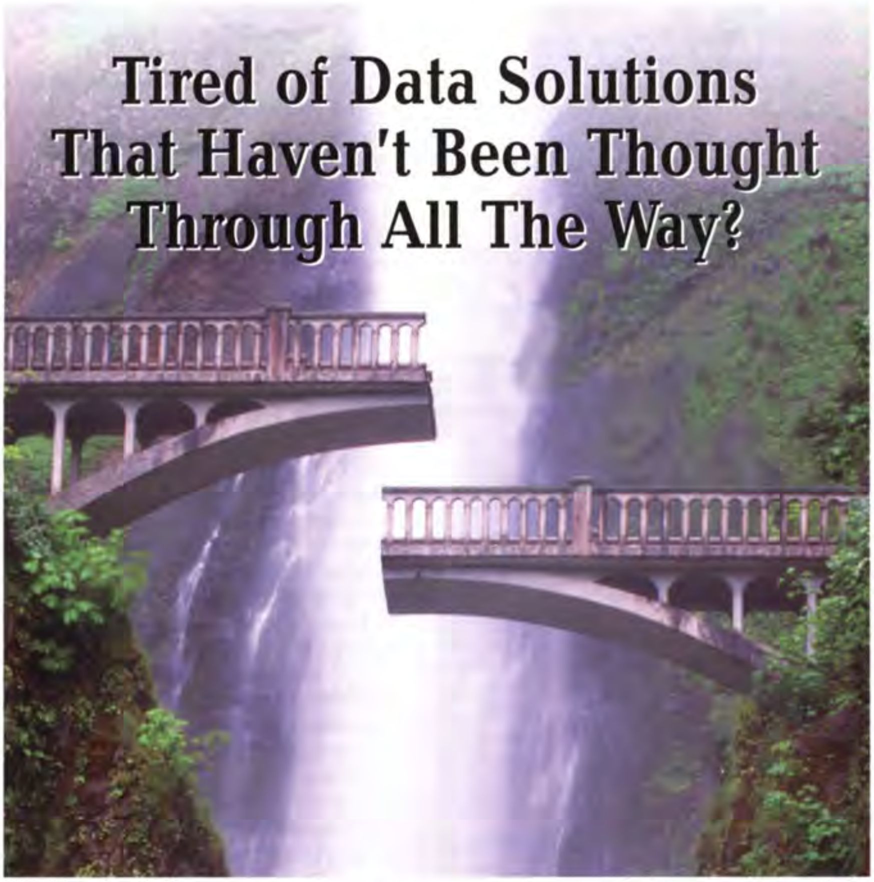

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Latinos: 58 percent of adults say they get some news on an average weekday from radio. This audience shows a preference for English (43 percent) compared to the share of radio listeners who get all their news in Spanish (34 percent) or from both languages (23 percent). But within the radio audience the share of the foreign-born (56 percent) that gets all its news in Spanish is larger than for any other medium.

Only 29 percent of the adult Hispanic population gets news on the Web and three-quarters of them get all their news off the Web in English. Just 20 percent of foreign-born Latinos report getting news from the Internet, compared to 44 percent of the native-born.

Voters prefer English

English-language media is the dominant source of news in one key segment of the Hispanic population: likely voters in U.S. election. Fifty-three percent of Latino voters get all their news in English and 40 percent of them get news from media in both languages. Only 6 percent of likely voters get all their news in Spanish.

A larger number of Latinos getting news in Spanish (70 percent) or in both languages (68 percent) said they were aware that President Bush had recently announced a proposal on immigration, compared to those in the English category (53 percent). Of those who said they were aware of the proposal, the foreign-born were more supportive (36 percent) than the native-born (20 percent).

Bush won higher approval ratings (59 percent) from foreign-born Latinos than the native-born (42 percent). While all segments say they would favor Sen. John Kerry over Bush, preferences on the race among likely Latino voters (Bush 39 percent vs. Kerry 52 percent) show that Kerry is running weaker than Democratic candidates in several recent presidential elections, who have captured about two-thirds of the Latino vote.

Native-born Latinos are more skeptical of Bush administration policies in Iraq than the foreign-born. For example, 59 percent of the native-born think the administration deliberately misled the public about the threat in Iraq before the war began, compared to 44 percent of the foreign-born. News media choices accentuate this difference: those who get their news only in Spanish are the least skeptical segment of the population.

Interest in major topics in the news varies considerably by language group, reflecting the mix of persons born in the United States and abroad in each group. For example, 77 percent of the English audience follows news of the U.S. presidential election closely, compared to 51 percent of the Spanish audience. In contrast, 72 percent of Spanish consumers follow news from their country of origin closely, compared to only 31 percent of the English audience. | Q

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Subscription Information: U.S. annual rate (11 issues) $70; Canada and Mexico rate $100 (U.S. funds); international rate $119 (U.S. funds). U.S. single copy price $10. Change of address notices should be sent promptly; provide old mailing label as well as new address; include ZIP code or postal code. Allow 4-6 weeks for change. **POSTMASTER:** Please send change of address to QMRR, P.O. Box 23536, Minneapolis, MN 55423.

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By Joseph Rydholm, *Quirk's* editor

Study shows how Latinos' news media habits shape their views

Research by the Pew Hispanic Center in Washington, D.C., shows that an increasing number of Hispanics are switching between English and Spanish to get their news. Even fluent English speakers rely on Spanish-language media to get news from Latin America and about Hispanic communities in the United States, and half of Latinos who were born abroad get at least some news in English.

The survey results show that exposure to English-language news media influences the views of Latinos born abroad on a wide range of topics. For example, compared to immigrants who get their news in Spanish, they have less favorable views of undocumented immigrants, are more skeptical of Bush administration policies in Iraq and are less trusting of news organizations. "How you get your news shapes how you see the world," says Roberto Suro, director of the Pew Hispanic Center. "For foreign-born Latinos that simple verity has powerful and complex consequences."

Latinos have strong views about the roles the news media play in society. The majority of Latinos, including those who only get news in English, see the Spanish-language media as playing an important role in the economic and political development of the Hispanic population. And Latinos are concerned that the English-language media contribute to a negative image of Latinos among English-speaking Americans.

The findings are based on a telephone survey of 1,316 Latinos in a nationally representative sample. Interviews were conducted from February 11 to March 11, 2004. Results have a margin of error of +/- 3.42 percent. The survey was conducted by the Pew Hispanic Center, a non-partisan research organization, which is a project of the University of Southern California Annenberg School for Communication.

TV provides the news

Asked which media they get any news from on an average weekday, 88 percent of Latinos cited network television, 82 percent local television, 52 percent newspapers, 58 percent radio and 29 percent the Internet. With the exception of radio, which shows a much higher audience share, these findings generally mirror results found in the general population.

Language preference seems to depend on the medium in question. With network television, the three language-preference groups (Spanish-only, English-only, and those who switch between languages) slice this audience, which includes broadcast and cable networks, evenly into thirds. The Spanish-only share of the audience for network television news is more competitive with the English-only share than with any other source of news.

For local television news, among those who switch languages in their overall choice of news, there is a small but notable preference for English local television broadcasts. Combined with a somewhat lower viewership in the Spanish category, this produces a larger share of this audience that only watches English news programming (40 percent) compared to the Spanish-only audience (29 percent) and the language switchers (31 percent). The English-only audience for local television news is stronger than the other language categories among young adults (ages 18 to 29).

English enjoys a distinct advantage in the print news audience. The share of Latino newspaper readers getting news only from publications in English is nearly three times larger (62 percent) than the share reading Spanish-language papers (21 percent). Latinos who get all their news in English give higher ratings to newspapers for being the most informative medium (16 percent) compared to Latinos who get all their news in Spanish (3 percent) and for giving greater service to Hispanics (15 percent vs. 1 percent).

Radio is extremely popular among

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