

Information on the Application of Research Methodologies

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Introduction

Whipple, Sargent & Associates (WS&A) is pleased to submit the following outline on the application of research and testing methodologies to address the information and decision making needs of the Department of Economic Development (DED) and the Massachusetts Office of Travel and Tourism (MOTT). ***This material will address all issues covered under the RFI.***

It should be noted that WS&A is uniquely qualified to respond to this RFI. Sherman Whipple, one of the founding partners of WS&A, has more than 25 years experience in the development and specification of research curricula utilizing all economic and social scientific research disciplines as well as the most of the research methodologies associated with each discipline. Additionally, in the area of Market Research, Whipple is known and recognized for significant contributions to the field, both as the creator of data gathering techniques and tabulation software and for the accuracy of published findings using his work.

This presentation will begin with a discussion and definition of research disciplines and related methodologies and then move to the specific information requirements stated in the RFI.

Research

The term “research” literally means to search diligently, investigate or experiment to discover facts, revise accepted theories or laws in light of new facts, or discover a practical application of new facts, theories or laws. In essence you use research to get information to make decisions or implement a plan. Research gives you insight and eliminates risk.

Selecting Appropriate Research

There is a popular misconception, particularly in social scientific research, which includes the disciplines of market research, marketing research, industry research, opinion research and policy research, that certain disciplines or methodologies may be better than another or in some way compete. **This is simply not true.**

Every discipline and methodology has its uses. The implication that one is better than another is like saying that one’s sense of taste is in some way superior to sight, touch or hearing. You can’t taste the way something sounds or hear the way something looks. It is the same with research.

For all forms of research there are only two criteria used to select the most appropriate research discipline and methodology. First you use your information requirement to select the appropriate research discipline and then you use the properties of the population under study to define the most appropriate methodology. ***For any given set of criteria, only one combination of discipline and methodology will produce a valid finding.***

It is important that DED and MOTT fully understand this concept, not only because this two step process is what we will be using through the balance of this RFI response, but also because it will empower you to secure better research and develop a greater ability to apply the results to your decision making. It is the basic skill of the research buyer/specifier.

Following are general descriptions of the applicable research disciplines which we will be using in the response and included in each we will briefly discuss the relevant methodologies.

Market Research

Of all the social scientific disciplines, market research is the most misunderstood. In popular usage the term is often misapplied to many of the other research disciplines including marketing research, industry research and marketplace research. Market research is a separate and distinct field. There are only 200 or so providers of this discipline in the United States.

The cause of this misconception, however, is quite understandable because market research findings are most often used as control data in all the other disciplines. Without market data to provide a frame of reference, the data from a marketing study, for example, would be irrelevant or misleading.

Every research discipline requires control data. Market Research is no exception. For market research the control is an empirical count or census. For consumer studies, market research often relies on the US Census to provide the control model.

In many cases a control population or universe is defined by circumstance as in all engineers, all public employees or international air travellers. All testing and data gathering is done in either a direct proportion or in a predetermined (weighted) proportion to the control so that the ultimate findings produce a 1:1 relationship to the real world.

Market research measures populations and audiences to define incidence and distribution. Market research produces specific categories of factual information which fall into the categories of Recognition, Penetration and Intent (RPI). This allows concept testing and benchmarking.

Market research is the only discipline which produces direct numbers to the real world or is capable of producing an estimate of sales potential. Most market studies are very large to provide sufficient data refinement for analysis. Further, because needs remain relatively constant for many years, (even though the way needs can be satisfied can change overnight), a market study has a relatively long life. In travel and tourism, for example, every three years would be an optimum test interval.

Since market research must be parametric and census proportional, the preferred methodology is a mail-out self-administered questionnaire using a monetary incentive. If the sample is large enough (5,000+) to eliminate interviewer interaction skew, market research has been conducted successfully using national CATI phone banks. The last major study using in-person interviews, once a standard when not everyone had a phone, was the Federal Reserve's Michigan Study which was abandoned in 1993.

Market research costs are usually determined by sampling size and incentive. A 1,000 base sampling will range between \$75,000 - \$100,000, a 10,000 base study will run between \$300,000 to \$500,000.

To summarize market research, it is a perspective which looks at the total universe and pinpoints your location. In a market study, if your actual share of the total market is, 2%, you will show up as 2% of the sampling. The goal of all market research is to achieve a direct 1:1 relationship with the real world.

Therefore, when you need to know about what will happen next, who is out there that you are missing, what else they do, in fact, anything where an accurate measurement is required, you need Market Research.

Marketing Research

In some form or another, nearly every business or organization already conducts marketing research internally and the reporting is presented in sales reports, inventories, customer lists, and prospect activity reports and feedback from those who receive your services. While often presented in tabular form, marketing research is almost always qualitative and non-parametric.

The benefit of marketing research is that it can be focused on a particular audience or around a specific issue. It allows great detail and open-ended questions. It can give you flavor, attitudes and relative ranking. You can probe motivations and gain tremendous insight into the effectiveness of your marketing process. It is a fantastic idea starter and feedback mechanism.

Marketing research produces an internal perspective on your marketing process or product. To achieve relevance marketing research must be performed using market research as its sampling frame or control before or after the sampling. This means that you either establish your marketing research parameters from a target previously quantified in your market model, or you allow your respondents to self-qualify and then see where they fit. Each has its uses.

Marketing research can test almost anything on almost anyone. Focus groups, advertising penetration and effectiveness studies, customer polling, mall intercepts, MAP testing, customer feedback mechanisms, and shopper surveys, Internet surveys are all marketing research methodologies offered by various polling, testing and research companies. It can take any form from a self-administered paper to full-interaction and role-playing.

Marketing research costs vary depending on methodology. Most charge a set-up fee \$5,000 to \$20,000 plus between \$1.00 to \$125 per sample. The \$1.00 would apply to a self-administered bounce back or Internet survey and the \$125 would be the cost for an in-depth interview or manipulative intercept.

To summarize marketing research, it is a narrow or focused perspective from the point of your business or offering and looks outward. In a marketing study your product or service may represent the lion's share of the data even if your actual share of the market is minimal.

If you have a marketing problem, need to fine tune your program, test satisfaction, need verbatums or fresh ideas, a marketing test is the best tool for your information requirement.

Marketplace Research

When you need information on share, sales effectiveness and relative appeal of different providers of goods and services, such as attractions, hospitality, tourism sites, etc., the appropriate discipline falls into the general category of marketplace research or competitive benchmarking/analysis. In private sector research, competitive benchmarking is how one businesses discerns the weakness of a competitor. If state tourism organizations have similar information requirements to corporations, then this is the appropriate discipline.

It would also be an appropriate technique to assist weak entities within the state to become more competitive. It all depends on who is the keeper of the findings and how they are applied.

Competitive analysis uses two forms of control data: Market research, to compare RPI of various businesses; and Industry research to form a baseline to monitor trends and relative share.

Marketplace Research uses the identical methodologies as market research (and can be included in a market study) but it is not always necessary for the research methodology to be parametric. In fact, competitive research is often strongly weighted towards early adopters, trendsetters and industry leaders.

Since marketplace researchers frequently use secondary research, pricing is typically per report or per hour including time they expend conducting follow-up. Report costs range from \$5,000 to \$50,000 and \$200 to \$250 is a reasonable hourly fee.

Opinion/Attitudinal/Motivational Research

There are very subtle differences in methodology as well as historical differences in applications between opinion research, attitudinal research and motivational research. Most in the fields, however, provide all three (which explain how Harris and Gallup stay in business when it is not an election year.) For this reason, we can group the field under Motivational Research.

Around this discipline has grown the field of psychographics. When you need to know how and why people respond or react to a specific stimulus or under a set of conditions in certain ways, you specify Motivational Research.

Many market studies today incorporate psychographic qualifiers, both because it adds an additional layer of insight to predict market trends and, to provide a control model for motivational tests.

Motivational research shares many of the methodologies of marketing research, but many practitioners add physical response (ie. eye dilation, salivation, and reward/association) to probe more deeply than Kenneth Starr.

This discipline can be tremendously effective in developing concepts for advertising, images and slogans. They can tell you why, not just what.

Like marketing research organizations most motivational researchers charge a set-up fee, a unit cost per subject or group and out-of-pocket for facilities, meals, videotape or manipulative. Individual interviews typically run in the range of \$300 each and groups may cost \$2,500 per day for the facility and moderator plus \$200 per participant.

A. Domestic advertising effectiveness.

1. To what degree do the advertisements resonate with MOTT's target audience?

If we assume that by “resonate” the Commonwealth’s information requirement is to gauge advertising penetration and effectiveness a marketing study using a standard P&E test will provide the information.

Unless the sole advising medium is radio, or the Commonwealth has unlimited resources to fund a large enough CATI sampling to offset interviewer induced bias, the standard pre-flight/post-flight mail-out P&E will produce the most accurate indication. Both surveys must be identical and the print design allows the use of graphics. The methodology allows mailing only to the target audience. A “Check Response” incentive will maximize return.

What opportunities exist, if any, to improve the manner by which the ads enhance customer perception of the state as a travel destination?

To a limited degree, the advertising P&E will be able to deliver this information or at least, highlight the issues. For specific information, Motivational research using a focus group, manipulative, or depth methodology will be of greater value.

2. Do the advertisements influence behavior? To what extent does exposure to MOTT's advertising lead to pleasure travel to Massachusetts? What opportunities exist, if any, to increase the percentage of customers who see our ads who also visit our state on a pleasure trip?

Here the information requirement is hard facts. Market research is the appropriate discipline.

The most appropriate methodology is a blind, census proportional, self-administered survey overlay using standard travel industry demographic qualifiers and psychographic qualifiers. Since the information is not required for a specific segment or issue but as a general finding of fact, a 1,000 base sampling may be used. Alternatively this could be an area of investigation included in a larger study.

B. Quantifying international visitation from select nations to Massachusetts.

During 1995, nearly 1.6 million international travelers visited the state. Massachusetts' primary are Canada, Great Britain, Germany, Japan, and France. DED/MOTT currently relies on data developed by the U.S. Department of Commerce (USDOC) to quantify visitation to Massachusetts from most nations. MOTT finds USDOC data often underestimates visitation from some nations, as some key airlines do not participate in USDOC's key measure of international visitation, the In-Flight Survey.

1. What measurement options exist, other than In-Flight Survey?

Here, one would imagine that US Customs or the various airport authorities would maintain empirical records which may be compared and contrasted with the Department of Commerce's data, or at least provide an accurate control.

2. Can MOTT implement its own program to measure international visitation? If so, how might an independent measurement program work?

With an empirical control model to create a frame of reference, it would be possible to develop a statistical sampling process at various major airports to produce a more accurate statistical measurement. There are certain considerations for such a test instrument.

If the active point were the gate, an intercept interview methodology could be very difficult to administer and costly to maintain. Additionally there would be an issue of language barrier. Using programmed distribution of self-administered test instruments in various different languages would solve that problem. To ensure participation and reduce data entry expense, this is a perfect application for a "Check Response" technique since the check instrument contains numbered boxes only regardless of the language of the questionnaire.

Additionally, this technique would produce a new market control model of the international tourism market which could provide an added benefit to the Commonwealth.

C. Effectiveness of the Getaway Guide's retail distribution program.

DED/ MOTT currently distributes over 1.1 million travel guides per year to potential visitors by retail distribution. The guide describes the range of leisure travel opportunities available throughout the Commonwealth. MOTT established a partnership with a retail chain that makes the Guides available to shopping customers. The retail chain places the guide in its stores in exchange for MOTT identifying the chain in its television advertisements.

- 1. Are the people picking up the Guide in the stores the same people as our target audience? If not, who is picking up the Guide? How can MOTT change its retail program to ensure more of its target audience picks up the guide?*
- 2. How did people picking up the guide find out about the Guide?*
- 3. Who is not picking up the Guide?*
- 4. What do people do with the Guide? If so, how might an independent measurement program work?*

The above information requirement can be addressed using a marketing P&E test with a market control model which either includes an RPI measurement of the Guide, or a separate focused market overlay which samples only the target audience. The P&E test could include an incentive questionnaire placed in a percentage of the Guides distributed.

5. Does the guide influence behavior? Does picking up the Guide increase the likelihood of pleasure travel to Massachusetts? Are people who pick up the Guide more likely to visit the state than those who do not pick up the Guide?

Presupposing that a market control model covering RPI for the Guide has been acquired, either in a focused overlay or as part of a total universe sampling, then an Attitude/Opinion/Motivational discipline may be applied using either a group or depth interviewing methodology to determine the qualitative variables and motivational outcome of various types of usage of the Guide.

D. Quantifying the economic impact of tourism on the state economy.

DED/MOTT currently contracts with a service provider to provide economic impact estimates for the state and each of fourteen counties. MOTT is confident in the data created by its existing model. However, MOTT seeks to learn more about other models that could provide other insights on the role of tourism in state and regional economies.

- 1. What are the varied research methods used to estimate the economic impact of tourism on state and regional economies?*
- 2. What impact measures do various models yield?*

Economic research is a standard methodology utilizing empirical data collected to represent direct revenue/expenditure, employment, and tax in relation to indirect revenue/expenditure, employment and tax for a given type of activity or commerce. It is a factual baseline. All practitioners of Economic research do it the same way, but it is possible, there may be differences in skill or experience.

For additional insight on relative issues within the Commonwealth's tourism industry either by county, specific destination or attraction, the appropriate discipline is marketplace research. Marketplace research would integrate both your market control and your economic control models to create a standard framework for additional observations of whatever subset including existing or proposed RTC, site, town, commercial center, infrastructure (ie. public restrooms) you would wish to evaluate, or report on.

Marketplace research uses either mail-out, hand-out or CATI methodologies for data gathering. Data presentation can be in any number of chart types and multi-dimensional maps.

E. Domestic visitor volume, demographics, and behaviors.

DED/MOTT currently uses TravelScope, a product of the Travel Industry Association, to quantify the nation's domestic visitor market. MOTT is confident in the TravelScope methodology and resulting data. However, MOTT seeks to learn more about other research products that could provide other insights on travel visitor volume, demographics, and behaviors.

Specific questions include, but not limited to:

1. What are the varied research methods used to estimate the national domestic traveler volume, demographics, and behaviors?

Market research is the only discipline to meet this information requirement. The methodology would be a national, census based, parametric survey. This can be done either CATI or using a self-administered mail-out with or without an incentive.

2. What degree of precision do various research methods lend to estimating visitor volume at the state level? At the sub-state level?

With the exception of sample sizes under 5,000 both telephone and mail-out market surveys produce identical precision at all levels. Precision is a function solely of sample size and adherence to the survey control data in the sampling and data entry procedure. (ie. using a 95% confidence interval with a 10,000 base study, a 50% response will be within + or - 1%, a 10% or 90% response will be within + or - .02%).

For example, a March 1989, 10,000 base, national travel and tourism benchmark for interests in the theme park and amusement industry produced a finding that Group A of 623 respondents (6.23% of US domestic households) planned to visit Massachusetts in the next twelve months, Subset A1 of 361 (3.61%) indicated an itinerary including Boston and Cape Cod, Subset A1a of 20 (0.2%) planned to visit Plymouth and Subset A1b of 14 (0.14%) planned to visit Plymouth Plantation as a specific destination.

The average party size for group A was 2.6. The average party size for Subset A1 was 2.7, The average party size for Subset A1a was 2.5 and the average party size for A1b was 3.1.

From the universe of 91,000,000 households you can take the percentage of each group, multiply it by the average number in the party and produce an estimate or projection. You should find that these numbers will be within 0.2% of the universe.

Group A	91,000,000	6.23%	2.6	14,740,000
Subset A1	91,000,000	3.61%	2.7	8,870,000
Subset A1a	91,000,000	0.2%	2.5	455,000
Subset A1b	91,000,000	0.14%	3.1	394,940

This was a national study. A more focused approach of Group A, for example 10,000 respondents in lieu of 623, would produce significantly higher data refinement for the subsets.

3. *What actionable information do various models yield?*

Here the discipline is research or statistical analysis. The facts presented in the tables generated from the study are all actionable. They are direct numbers and require no interpretation. But full chi-square tables do contain additional information which can filtered (eliminate all but), massaged (a+b) or threaded ($V=a * b * c$).

As long as the study has tested areas of response relevant to your information requirement you will acquire factual incidence of the RPI for each area of investigation. One can filter the raw data for up to the possible number of responses, one may massage the data for up to the number of qualifiers, and one may thread or profile any given response for up to three times the number of significant variables/indices (cross tabulations).

Filtering and massaging will produce data which can be presented in a graphical form. The process of threading creates sets of discrete variables for use in a mathematical formula or model. This allows the substitution of variables to create both “what if” scenarios as well as regression or extrapolation of missing data based upon known data.

F. Impact of Internet-Based resources.

DED/MOTT currently maintains a site on the World Wide Web that describes pleasure travel opportunities in the Commonwealth. The site is targeted primarily, though not exclusively, to domestic travelers. Available industry data suggests that the role of Internet-based information is becoming increasingly important to domestic travel planning.

1. How do people use our web site? How many visits does our web site attract over time? How are the visits conducted? How might the site be changed to improve the utility and aesthetics of a visit?

To meet your usage information requirement, tracking software and services are available from many sources including most Internet hosting services. All the information you require can be automatically gathered through such devices. This would fall under the category of marketing research.

To meet your qualitative or product improvement information needs, there are many web based marketing research organizations who create web surveys which launch with every new visitor to your site (check out ASI's at <http://www.ibm.com>), or, after an interval of browsing, or as a user selectable link.

2. Does the web site influence behavior? Does visiting the web site increase the likelihood of pleasure travel to Massachusetts? Are people who visit our web site more likely to visit the state than those who do not pick up the web site?

For a factual relevance, this information would be best produced through a market study and this could be easily included.

3. Who is currently using our web site? How well represented is our target audience in using our web site? How might we improve our web site strategy to attract more of our target audience?

4. How can MOTT determine when (and how) to change the role of its web site in providing pleasure travel information to prospective visitors?

Here a comparison between your marketing and usage information and your market survey will provide the information you require. This is essentially a comparison process and analysis of implication.

G. Fulfillment effectiveness.

DED/ MOTT currently fulfills customer requests for information through in-house and contracted resources. MOTT's provides its Getaway Guide as its primary fulfillment resource. MOTT provides additional information resources, such as brochures and maps, through its in-house service to interested parties.

1. Is the fulfillment system meeting the needs of our target audience? If not, how might the fulfillment system be improved to meet the needs of the target audience?

Testing fulfillment would require a marketing P&E test or follow-up which can then be compared and contrasted with your market data. An appropriate methodology would be to randomly insert incentive, self-administered questionnaires in materials being distributed.

2. How effective are MOTT's fulfillment systems and strategies? Is the fulfillment system responding quickly enough, with the right information? How do the strengths and limits of MOTT's current compare to other systems in the industry? How does MOTT's system compare to fulfillment systems used in other industries to serve the same audience?

If you offer the opportunity for P&E respondents to participate in a follow-up, an attitudinal/opinion/motivational researcher could produce the qualitative answers.

The comparative information, however, requires marketplace research. This could be benchmarked in a national market study as well.

H. Domestic and International Return on Investment (ROI).

DED/MOTT seeks to identify viable ways to measure returns on tax dollars invested in tourism promotion. MOTT is particularly interested in isolating the impact of its activities from other promotion efforts - both private - and public - sector led - attracting pleasure travelers to the state. MOTT's intent is to identify a model that measures program investments against measurable and distinct program impacts.

1. What are realistic ROI metrics?

Without a standard reporting methodology and common matrix for your research curriculum, is not feasible. However if the Commonwealth adopts and implements statewide standards used in the travel industry such as visitor days, per capita expenditures, and one standard model for traffic counts using empirical data, multiple collection sites, and statistical deviation to eliminate multiple counts of the same people. Then the combination of this with your economic impact study will give you very precise and objective results.

2. What research methods reliably estimate ROI?

Essentially there are three disciplines required to meet this information requirement. First market research can define sales potential by testing intent for concepts included in a survey. Next, developers, consultants and accountants can estimate the costs involved and the specific features and benefits related to the investment. Finally, focused marketing research can determine factors of load, risk, perception of participation, competitiveness, and price/cost/load sensitivity relationships from a target audience to determine rate of return.

A comparison of the costs including finance and infrastructure can then be compared to the revenue and you will have a very reliable estimate of return on investment.

3. How do various research methods isolate the impact of MOTT's marketing efforts from other promotions?

It is highly unlikely that any methodology could actually isolate MOTT's efforts from all the other factors which influence behavior, but is possible that a comparison of your market data, marketing P&E tests, on site samplings, and empirical results could suggest that they contribute.

Then again, MOTT could do an experiment. Apart from the regular promotional efforts, MOTT could create one or more test markets in places such as Wamego, Kansas, where no-one in the town has ever visited Massachusetts (or traveled beyond Topeka for that matter) and launch a promotion. This would involve a pre-flight P&E as well as an on-site barometer or reporting from the local travel agent.

This could actually be a lot of fun.

I. Effectiveness of the Regional Tourism Council (RTC) program.

During 1997, DED/MOTT distributed over \$5.6 million in state room occupancy tax collections to thirteen regional entities dedicated to promotion tourism. These RTCs must match the dollars granted by MOTT with private-sector funding on a 1:1 basis. MOTT's relationship with the RTCs is primarily limited to oversight. MOTT ensures each RTC develops a marketing plan, matches state room tax dollars with private-sector dollars, and uses state funding for travel promotion purposes. The RTCs, governed by private-sector boards, independently develop and execute their own marketing plans. MOTT and RTCs have collaborated on some travel promotion projects.

MOTT seeks to identify and quantify success metrics for the RTC program. These metrics will help MOTT maximize impact of state funding on tourism generated within each RTC region. Specific questions include, but are not limited to:

1. What are realistic success metrics for the RTC program?

Without a standard reporting methodology and common matrix for your research curriculum, is not feasible. However if the Commonwealth adopts and implements statewide standards used in the travel industry such as visitor days, per capita expenditures, and one standard model for traffic counts using empirical data, multiple collection sites, and statistical deviation to eliminate multiple counts of the same people, the combination of this with your economic impact study will give you very precise and objective results. In fact since MOTT controls the purse strings, it would not be unreasonable to suggest that such standards and participation be a requirement for the RTC program.

2. What research methods can reliably quantify the success metrics?

Marketplace research would integrate both your market control and your economic control models to create a standard framework for additional observations of whatever subset including existing or proposed RTC, site, town, commercial center, infrastructure (ie. public restrooms) you would wish to evaluate, or report on.

With the RTC using a standard attendance reporting, the standard matrix or banner for their local testing, the whole could be easily integrated for a complete and comprehensive insight on the state's tourism industry.

This process could be expedited by using either a private support section of your web site for updates and reporting (forms and submissions), via E-mail, or a pre-fielded binary attachment.

3. How does the success of the RTC program compare with similar programs in other states?

This would be very hard to test. While recognizing the importance of this information, no two states are the same, and the RTC program is somewhat invisible and not exactly the same in all states. a marketplace researcher could provide competitive intelligence and indices of participant satisfaction but the relevance would be so obscured by subjectivity as to be of little value.

4. How might the existing MOTT/RTC program be improved to expand travel to within each RTC area?

Not to be non-responsive, having promised to respond to every information requirement, but until we have common metrics and a model built, there is no way to address this. Let's see what we find.

Summary

Frankly I am impressed with MOTT's information requirements as represented in the above sections. It is comprehensive and indicative of a positive attitude towards tourism issues. The fact is, however, you will need to do all of it and more to achieve an accurate insight on the issues.

While invited in the RFI to "Transcend" your perspective, I think we have already gone far enough for the time being. By dealing with one issue at a time, if a study were conducted on each of your information requirements, it would not only cost more than your entire budget, but you would create a monstrosity of non-relational abstractions. You would have a lot of reports and no way to make sense of them.

At the same time, with the exception of the international audiences, the entire program including everything you have asked, plus everything you or your RTCs could ask in the future could be covered in a single research curriculum, administered internally for design and integration, and put to bid for the test methodology, data gathering and tabulation expertise only.

Not only would this save you millions, but the information would be much easier to assimilate and act upon. You would, in effect, transcend your present limitations to become the research expert, not me.

Respectfully submitted,

Sherman Whipple
partner