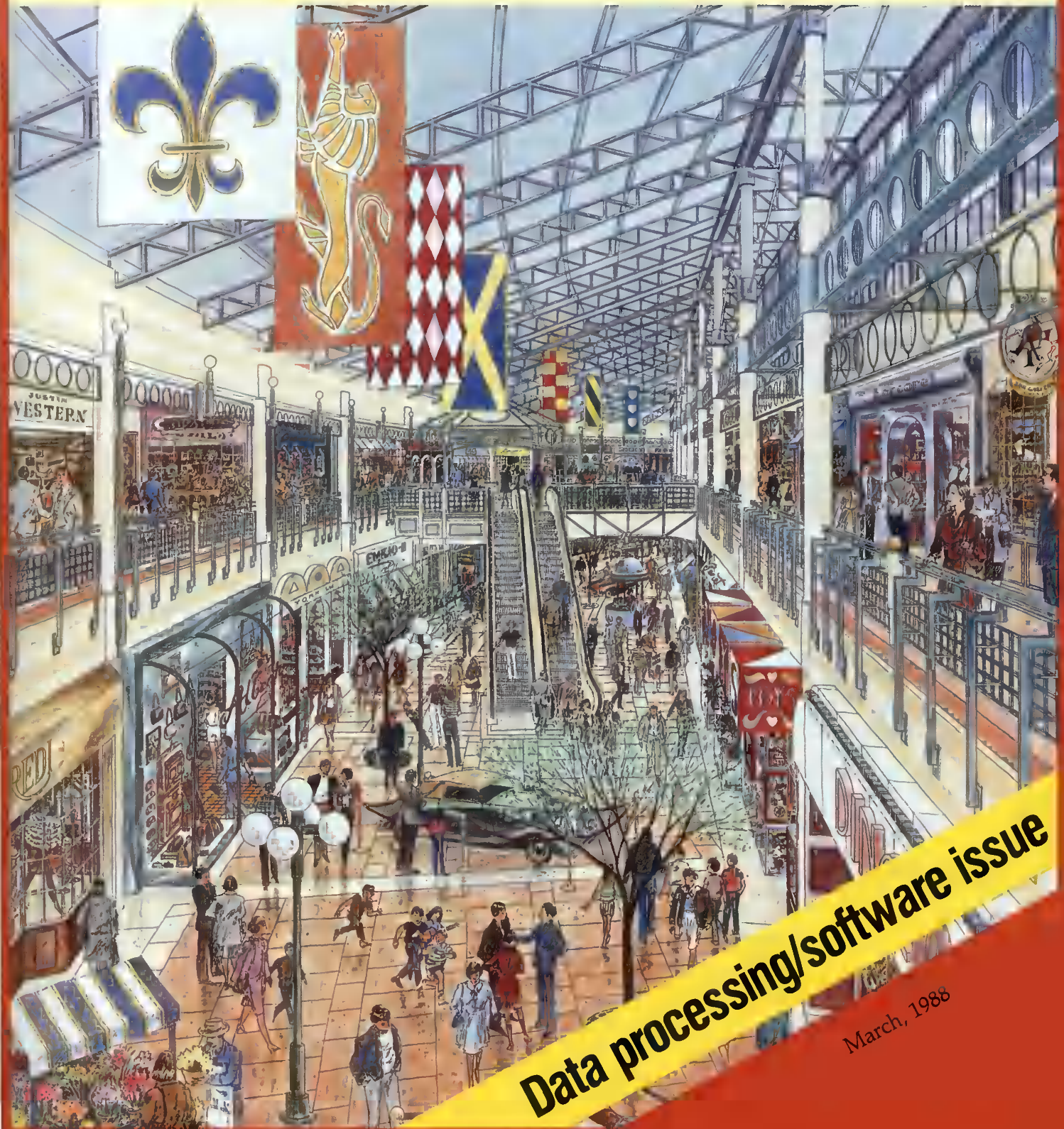


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MARKETING RESEARCH

Review



Data processing/software issue

March, 1988

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MARKETING RESEARCH

Review

Vol. II, No. 3

March, 1988

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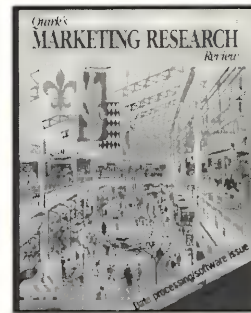
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Cover

This is the second annual data processing/software special emphasis issue. On the cover is the attractive MainPlace/Santa Ana, Orange County, Cal. Photo courtesy of JMB/Federated Market Research, Cincinnati.

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Site analysis support main function of Dayton researchers

By Beth E. Hoffman
managing editor

Research analysts for Dayton-Hudson Corp., Minneapolis, spend their working days in the city's largest office building which provides a panoramic view of downtown Minneapolis and local suburbs. That is, of course, when they're not out of the office. About 30% of their time is spent traveling and being on the "ground floor level" perusing potential markets to penetrate with new stores.

"There's no substitute for field work and no other way to find out about a market than to visit it," claims Larry E. Carlson, vice president of the company's Area Research & Planning. AR&P provides research and site analysis support for all new stores built by the company. Besides Dayton's and Hudson's department stores, these include Target discount stores, Brandon's, Lechmere and Mervyn's stores.

Since a lot of analysts' time is involved visiting a market and surrounding community long before the decision is ever made to break ground and build, Carlson says his department is frequently referred to as "the first in and the first out."

"We provide all front-end information from where to locate and how many stores to build, to sales estimates and total market strategies." From there it's the real estate people's responsibility to clear zoning requirements and negotiate with the developer. Then store planners and construction people figure out the



DAYTON HUDSON CORPORATION

store's placement and layout. Finally, preparations are made for its opening.

2 1/2 years ahead
"Typically, we are in the market looking at a store site 2 1/2 years ahead of the time the store actually opens," explains Carlson. "It's also typically the only time the department will deal with that site again, at least from a research standpoint."



Larry E. Carlson
vice president
Area Research & Planning

Over the past 20 years since the research arm of the company went in-house - so as to build the quality of the staff, create a strong database and respond more quickly to management - over 600 stores have been built. In 1987, sales topped \$10 billion.

Dayton-Hudson allocates a substantial portion of its capital budget to annually researching and planning new store sites. Market research, says Carlson, helps the company make "good business decisions" because "we can't go on instincts alone."

"We invest a significant amount of capital in each store we build. We simply can't afford to spend that much money without the facts."

The facts the department uses before making such costly decisions are numerous and all necessary in achieving a profitable return on investment and to survive in the market over the long run.

From a local standpoint, the department uses the Twin Cities' area Metropolitan Council which gives population and growth characteristics, demographic and income data, as well as restrictions on sewer and water uses, and any transportation systems being planned.

Local planning departments of Minneapolis and St. Paul frequently conduct population studies of neighborhoods which show the growth potential of an area or its expansion demographically.

The *Minneapolis Star Tribune* and the *St. Paul Pioneer Press Dispatch*, the Twin Cities' two largest newspapers

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JMB/Federated Market Research

Integrating marketing tools facilitates



MainPlace/MarketPlace in MainPlace/Santa Ana, Orange County, Cal.
A joint venture development of JMB/Federated Realty and Henry T. Segerstrom.

JMB/Federated's mission

JMB/Federated Realty's continuing success in the shopping center industry is supported by its centers management and market research divisions. JMB/Centers Management Co. specializes in providing complete management services for retail and commercial properties. The firm's full-service management includes center managers, marketing resources, leasing professionals and development/construction/design resources

for redevelopment or expansion of properties managed. JMB/Federated Market Research Co. performs research for institutional investors and retailers across the country. Specializing in consumer research, location research and strategic planning, JMB/Federated Market Research Co. can provide services for retailers, developments, center management, institutional investment companies, and municipal governments.

By Beth E. Hoffman
managing editor

Imagine having the opportunity to go to work in a building that offers restaurants which accommodate a tight schedule or a leisurely and elegant lunch with clients. Or, how about a building that offers high fashion stores and other specialty shops? Or, how about a building that provides entertainment, a health club, cinema and an all-suites hotel? Better yet, how about a building that has all of these luxuries? Believe it, because such a development is opening in Cincinnati in 1992.

Introducing FountainPlace, considered a Cincinnati landmark and at 50 stories, the tallest building in downtown Cincinnati. Located opposite the city's foremost urban park, Fountain Square, the mixed-use development will occupy one million square feet of retail, hotel and office space.

The development is impressive by anyone's standards. One-hundred specialty shops and restaurants will provide the retail component of FountainPlace. The 225,000 square foot, three-level retail Galleria surrounding a glass enclosed rotunda will be brightened with streams of natural light and refreshing water features. The entire retail Galleria and rotunda will support a fourth floor food, entertainment, health club and cinema complex.

An 11-story atrium and glass elevators will be the focal points of the 264-unit hotel occupying levels five through 17. Above this, 30 stories of prime office space will rise to a public observatory on the uppermost level.

This leisure and business wonderland is a joint venture of JMB/Federated

location of new construction

ated Realty, acting as managing developer, and Emery Realty/NORO.

Based in Cincinnati and with regional offices in Los Angeles, Tampa and Dallas, JMB/Federated is among the country's leading companies in real estate development and acquisitions with 138 regional malls and community centers, 153 office and industrial buildings, 153 multi-family residential properties and eight luxury hotels. Many landmark retail developments are credited to the JMB family of development companies such as nationally-known showplaces like Water Tower Place in Chicago, Copley Place in Boston and Town Center at Boca Raton.

Attaining such status isn't achieved by real estate agents who "kick the

Analyses of consumer behavior, trade area dynamics and the competitive environment help the development company to respond to the changing dynamics of retailing and to maintain existing centers as vibrant marketplaces within their communities.

dirt" in order to make decisions on properties. The sites for all of JMB/Federated Realty's developments are chosen on the basis of highly sophisticated research techniques.

Through JMB/Federated Market Research Co., analyses of consumer behavior, trade area dynamics and the competitive environment help the de-

velopment to respond to the changing dynamics of retailing and to maintain existing centers as vibrant and vital marketplaces within their communities.

Three-fold purpose

The role of market research at JMB/Federated Market Research has three purposes, explains Rohan Andrew, president of this division of JMB/Federated Realty.

"The first is consumer research, which comprises a basic data 'building block' function. The second is location research which helps us identify and evaluate new development opportunities. And the third is strategic planning which involves long-range probes of emerging market demographics and identifying within these market areas future opportunities. Each phase of research builds upon the other, adding strength to the integrity of the overall program."

While many retail developers engage in these research functions, what sets JMB/Federated apart is its application of a wide variety of marketing tools. One of these tools is VISION, a second-generation customer targeting and lifestyle segmentation system developed by National Decision Systems (NDS), Encinitas, Cal., a target marketing and marketing information company.

VISION, says Richard Brumfield, manager of consumer research, "is a key consumer discriminator when demographics alone look the same." Another tool is Polk Vehicle Origin studies which help define retail trade areas and consumer travel distances to shopping centers. Last, statistical models, which show the surplus/deficit of re-

continued on p. 10



Rohan Andrew



Richard Brumfield



Susan Olson

tail space in metro areas, facilitate future development planning.

Carrie Goodman, public relations manager at NDS, praises the company's sophisticated use of multiple resources.

"All in all, JMB/Federated is a perfect example of the necessity to integrate different databases, such as NDS' and their own proprietary information, with systems such as NDS' Infomark and Lotus software, to complete the most thorough market research analysis."

Andrew, Brumfield and Susan Olson, manager of market feasibility analysis, describe how these research tools are integrated into the company's research functions.

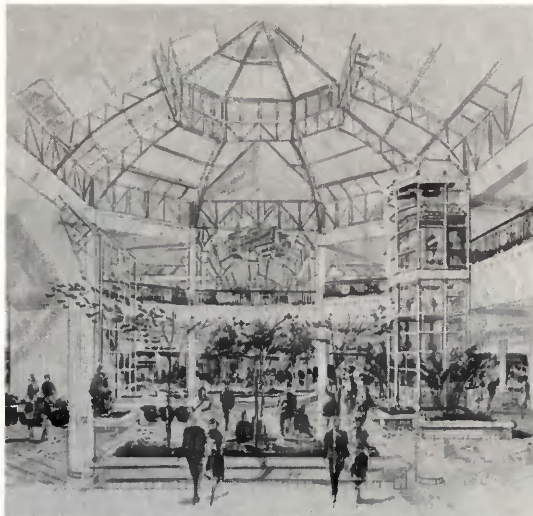
According to Brumfield, consumer research is conducted to "help us define the trading area of our centers from which 70-80% of our customers are drawn."

To define the trading area, the firm conducts customer exit surveys every other year at its shopping malls. "We do these to monitor trading area changes in terms of both geography and shopper behavior. This knowledge permits us to adopt marketing strategies which intensify our business activity," explains Brumfield.

Demographic information is obtained in these surveys and questions about where the customers shop, what they did in the center that day, as well as "customized questions" on potential renovation or expansion, and the customers' attitudes toward the center, media and special events are also addressed in the survey.

Once the trading area is defined, telephone surveys are conducted among shoppers and non-shoppers in the trading area to determine the center's share of market and to help JMB/Federated identify strategic marketing programs that will yield an even greater share of the market in a particular trade area.

Respondents are asked where they shop, how often they shop at these places, and queried with customized "image questions" which address issues of center positioning. Through these, JMB/Federated learns what the



Penn Square Mall, Oklahoma.
A JMB/Federated Realty redevelopment.

customers feel about a whole variety of attributes relating to its shopping centers, such as its level of quality in small store presentation, its convenience in terms of access, and even the helpfulness of sales personnel. Participants are also asked what television and radio stations they watch or listen to so that future advertising can be closely matched to the target customer.

"Image questions help in the positioning of our centers and knowing customers' media habits helps us de-

"Customer exit surveys monitor trading area changes in terms of both geography and shopper behavior. This knowledge permits us to adopt marketing strategies which intensify our business activity." Richard Blumfield

cide which media to use for advertising purposes," explains Brumfield.
Assess competition

Overall, both of these surveys help the company profile its customers, assess the competition and find out what people like and dislike about the centers.

"These studies are a kind of report card," describes Brumfield, "to show us how we've progressed from one

study to the next, and they provide a way for us to assess changes occurring in the marketplace, its competition profile and the economy. The surveys help us to monitor those changes and make plans for the future."

Before either of these surveys are conducted, JMB/Federated uses NDS' Infomark and VISION systems to get an idea of the kinds of people residing in a trade area, such as their gender, age, housing, income and educational level.

After the surveys are conducted, the trade area is "mapped out" via NDS' micro-computer mapping system to find out which areas a center is

penetrating more highly, and to estimate the number of people in the trade area and their potential expenditures.

"Using VISION after doing the surveys helps us classify households more intelligently. It provides us with more detailed and richer data to better identify trade areas and to help us tailor our advertising. It also allows us to compare our customers to the broader market and assists us in deciding whether we need to make some changes in our center positioning."

Attracting tenants

The data generated from these surveys is invaluable to JMB/Federated not only in terms of advertising and positioning of the mall, but in leasing to current and prospective shopping center tenants.

"The NDS Infomark system helps us assess the dimensions of trading areas, provides census tract data, zip codes, income characteristics and the growth projected to take place within those areas," says Brumfield.

Another tool which allows JMB/Federated Market Research to describe the trading areas of competitive centers is Polk Vehicle Origin studies. The company does this by doing license plate surveys at these centers.

"It's our way of analyzing the competition," notes Brumfield. "This information is then fed into the NDS system and it figures out what the demographics are of the competitive market."

For location research, JMB/Feder-

continued on p. 28

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BOULDER CO.	X	X		X	NEW ORLEANS, LA	X	X	X	X
COUNCIL BLUFFS, IA/ OMAHA, NE	X		X	X	PHOENIX, AZ	X	X	X	**X
DENVER, CO.		X	X	X	PINE BLUFF/ LITTLE ROCK, AR	X	X	X	X
DES MOINES, IA	X	X	X	X	SALT LAKE CITY, UT	X	X	X	X
DETROIT, MI	X	X	X	*X	SAN RAFAEL, SAN FRANCISCO, CA	X	X		X
EAU CLAIRE, WIS./ MINNEAPOLIS, MIN.	X		X	X	SEATTLE, WA	X	X	X	X
JACKSON, MS	X	X		X	TALLAHASSEE, FL	X	X	X	X
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READING THE MINDS OF THE MARKETS!

Computers integrate firm's multi-city data collection operation

"Because projects are computer-controlled and analyzed, and with all offices tied into the same system, we are able to serve the client better and eliminate errors caused by paper and pencil and verbal communication, all for about the same cost as standard data collection." Karen Sams Miller

The more markets a data collection firm serves, the more time, money and energy are required to manage its internal operations, communicate among its satellite offices and provide its data collection capabilities.

Consumer Pulse, Inc., a 10-market, nationwide data collection network of permanent mall facilities and field offices headquartered in Detroit, has dramatically improved the management of these responsibilities as well as the quality of its data collection and internal procedures through the use of computers.

Richard Miller, principal of CPI, has developed a completely integrated computer system on the company's IBM System 36 which is capable of doing everything from coordinating data collection projects for its satellite offices to keeping track of the company's current financial status. With the satellite markets linked to the headquarter's system through the use of smaller versions of the IBM PC 36, projects can be costed, budgeted, scheduled and updated quickly and easily. Furthermore, as the job progresses, productivity is monitored. Meanwhile, information such as a market's availability, financial history of past projects, CPI's payroll, accounts payable and accounts receivable are completely integrated in the system and available to authorized CPI personnel.

Four programs

The system, says Miller, is comprised of four main programs: "Alert/Job Processing," "Job Tracking," "Tally Processing" and "Financial Applications."

Alert Processing is the initial program that the vice president of marketing at corporate headquarters or anyone of its satellite directors uses when a client calls for a project quotation. This program provides menu-driven screens for entering project specifications, formulas for costing and budgeting and availability for scheduling. Alert Processing assures the accuracy of communicating to all offices the same information. A cost estimate is provided "on the spot," thus making the firm more responsive to its clients.

If the client approves the project, the "alert" is turned into a confirmed study in a program called Job Processing. This program is the key to all work that is being conducted in the CPI network. The program stores job specifications, production summaries, on-going incidence and invoice data, all of which are automatically updated throughout the network and the life of the study. In addition, confirmation letters of study specifications or changes can be generated from this program.

All job information received at corporate or in the individual markets is then transmitted twice a day. This assures that each market has identical information which includes the number of briefing, travel, interviewing and supervisory hours required to complete the jobs, the number of days necessary to complete the studies in the mall or field and any other out of pocket expenses associated with the projects. This data is important for the individual offices because it helps them monitor their job

productivity and maintain the client's budgets, says Miller.

The next program, Job Tracking, monitors productivity of each project in each market by requiring directors to provide daily tallies of the total number of interviews completed and the number of hours worked. This ensures that the interviews are being completed on time and that the project is being completed within its budget. Directors can then give clients quick and accurate reports and notify them of potential problems. This also allows markets to weekly transmit their payroll to corporate for processing.

Comparing incidence

Tally Processing is the third main program on the system. By taking the client's tally sheet, the program allows the satellite offices to key punch daily detailed tally information by interviewer. This allows management to compare actual incidence to quoted incidence and determine abnormal qualified or initial refusal rates among individual interviewers.

In addition, CPI has on its corporate staff a vice president of operations who acts as liaison among all markets and between clients, if necessary, by daily monitoring the Job Processing program for production in all markets to troubleshoot and solve problems.

Once the job has been completed, satellite offices confirm the out-of-pocket costs and update the project invoice if necessary. The entire job file and invoice are then sent back to corporate for processing.

After invoicing, a file is created called Job History. Here, the specifications and transactions of past research projects are stored. This enables CPI to analyze data collection trends, understand its client and study mix and develop its marketing plan. Also, should a client call back a year later and request that a similar project be conducted, all the specifications can be accessed for review. This file also keeps a record of the client's payment history and year-to-date sales.

Memo feature

Another valuable feature of the system is "Memo." Memo allows corporate and all markets to communicate with each other electronically and in print without the use of telephone and time. For instance, if a client changes a study specification, a memo can be sent to the appropriate markets indicating the change, thus each receives the same information in writing.

The final program of the system is a customized Financial Applications package which incorporates all aspects of sales, payroll and other accounting procedures including invoicing, general ledger, A/R and A/P. These functions are totally integrated with the Alert Program and are centralized at corporate headquarters. The program also generates detailed monthly sales reports and analysis of work in progress to aid the firm in scheduling and in sales efforts.

Because of CPI's total commitment to computerization, the computerized data collection aspect now represents approximately 30% of its business volume. To collect and

process questionnaire data, the company uses IBM PC's and Sawtooth Software - the Ci2 System for computer interviewing in the malls and the field, the Ci2 CATI System for computer-aided telephone interviewing, the ACA System for conjoint analysis, the APM System for perceptual mapping and the Ci2 Coder for categorizing open-ended responses. Data collected is either sent to the client in the conventional manner or by modem. By

"We are great believers that the system benefits the client and the management of our business by making our operation more efficient and responsive and thereby insuring the quality of data collection." Karen Sams Miller

eliminating data punching and cleaning, data can be tabulated and turned around more quickly and accurately than by traditional methods.

Insuring quality

The capabilities of CPI's computer system have put the company on the leading edge of how computers have revolutionized data collection and the marketing research industry, claims Karen Sams Miller, another principal of the company. "We are great believers that the system benefits the client, especially those working in multiple markets, and the management of our business by making our operation more efficient and responsive and thereby insuring the quality of data collection.

"Because projects are computer-controlled and analyzed, and with all offices tied into the same system, we are able to serve the client better and eliminate errors caused by paper and pencil and verbal communication, all for about the same cost as standard data collection," asserts Sams Miller. "Having the company's financial system tied into the package has also allowed us to get bills out faster, bring in revenue quicker, provide more consistent cost quotations and analyze our current position and plan better for the future." MRR

Consumer Pulse, Inc., provides complete data collection services including mall, executive, in-store and field interviewing, local and WATS telephone interviewing (all with CRT available), focus groups, audits, and mystery shopping in Baltimore, Charlotte, N.C., Cleveland, Colorado Springs, Colo., Denver, Detroit, Los Angeles, Milwaukee, Philadelphia and Washington, D.C.

Market segmentation helps bank classify customers

How can a company learn about its customers? Where do they live? What products do they own and use?

These are the types of questions that the market research staff at Crestar Bank have been answering for the last few years. Rick Kolster, consumer market research manager at the Richmond, Va.-based bank, explained that in order to answer such questions, certain information tools are needed.

To develop these tools, Crestar's consumer research group first looked at the information within the bank's own customer information system. Selected account information for the entire customer base was gathered from many separate data processing systems and integrated in a uniform file. By making a copy of the entire file and adding to the information other pieces of data from sources outside the bank, a database was created that effectively is being used as a market segmentation system.

Data elements

Kolster explained that the building of the system started with the most basic pieces of information such as customer name, residential address and Crestar product ownership and usage. Since certain financial relationships are better understood at the household level rather than the individual customer level, specific customer information was processed in such a way as to identify those customers who comprise a single household.

The process, known as householding, is a computer-assisted match rou-



Crestar Financial Corp. (formerly United Virginia Bankshares, Inc.) is the holding company for Crestar Bank of Virginia, Crestar Bank N.A. of Washington, D.C. and Crestar Bank MD of Maryland (formerly United Virginia Bank, NS&T Bank, N.A. and Bank of Bethesda, respectively). Headquartered in Richmond, Va., Crestar serves customers through a network of 234 banking offices and 145 automated teller machines. It offers a broad range of banking services, including various commercial and consumer loan and deposit instruments, trust services, bank credit cards and international banking. Crestar's subsidiary, Crestar Insurance Agency, Inc., offers personal auto and homeowners insurance as well as a variety of annuities and life insurance products. Discount brokerage services are offered by Crestar's subsidiary, Crestar Securities Corp. First and second mortgage loan origination and servicing and Capitoline Investment Services Inc., respectively. The non-banking subsidiaries provide services throughout Virginia, Washington, D.C. and Maryland. Crestar Mortgage Corp. also serves customers throughout the southeastern U.S.

tine that focuses on the customer last name, residential street address - both number and name, and the zip code. Each identified household is assigned a unique number, just as individual customers are assigned a unique number. Having the households identified allows the research staff to associate Crestar product ownership at both the individual customer and household level so that a complete relationship with the bank can be identified.

Knowing which bank customers make up households is valuable by itself but Crestar has added information to its segmentation system that permits the research staff to know more about the nature of the households that make up its customer base. The additional insight is provided by the use of a geography and Census demographic information system that provides data elements for the segmentation system.

Cluster codes

The information that has been added is known in the market research industry as cluster codes. A number of market research vendors offer such systems, packaged in a number of different forms ranging from "stand alone" desktop computer work stations to data that are run on mainframe computers. Regardless of which form is used, the basic element of the respective cluster code systems is the format for the codes themselves.

Crestar uses the codes in both a desktop work station and on the bank's mainframe computer. The particular system Crestar uses considers 117 demographic, socioeconomic and hous-

ing characteristics from the 260,000 U.S. Census block groups to identify 48 homogeneous cluster segments. Each Census block group is assigned to one of the 48 segments, making it possible to draw conclusions about the nature of households based on the residential address and the identified Census block group.

Each of the cluster codes are described by a written description that characterizes the dominant age of the household head, likely household income level, presence or absence of children, age and estimated value of housing.

Segmentation system

Thus, Crestar's market segmentation system is a database that combines bank customer information, identifies

"Our objective is to know the customer base and identify those customers who are strategically important to us. We also want to know why they chose the product mix that they have and ultimately, how we can make our customer base grow." Rick Kolster

households, and identifies Crestar product ownership and usage. In addition, standardized geography codes, based on the U.S. Census, are used to permit inter- and intra-area comparisons of household types using characterizations found in the cluster code system.

The information is used in a number of different ways. The most basic use is a profiling of the customer base in various ways, such as geographic concentrations, product ownership concentrations and measuring the strength of the market as shown by types and numbers of households. Having this type of information provides answers to some of marketing's most basic questions. However, simply having a "picture" of the customer base is not enough. The information has to be used in actual marketing activities to

make the system truly valuable.

Information at work

Once the research staff knows where the customers are located, judgment can be made as to how effectively the bank serves its customers with the branch system, promotional appeals and media messages. Due to the use of Census-based geography, measurement can be made of areas within and outside the trading area the bank considers as its markets. For key segments to which the bank specifically wants to give attention, the cluster codes provide a way to measure the size and know key attributes of the market.

The segmentation system allows the research staff to know how well Crestar products have been sold in the past and the configuration of product ownership within types of households (cluster codes). Having the Crestar households identified with cluster codes permits examination within the customer base and also provides insight as to financial product ownership for those households which do not use Crestar products but are assigned the same cluster codes. This information becomes the basis for making promotions to customers with whom the bank would like to develop a relationship.

Kolster speaks highly of the use of cluster codes in terms of its ease of use and timeliness. Considering their use and other Census information in a desktop work station, Kolster says, "It gives us the convenience of having a tremendous amount of information at our fingertips. The information is easily accessible, timely and gives current estimates for forecasting and making projections. Since this information can be displayed on a map, the system makes communicating information easier, too."

Better decisions

Kolster says the reliable information which the segmentation system generates has enabled Crestar to make "bigger and better decisions with greater certainty. Our objective is to know the customer base and identify those customers who are strategically important to us. We also want to know why they chose the product mix that they have and ultimately, how we can make our customer base grow. Simply, the segmentation system is a way to help decide how to make efficient allocation of our resources." MRR

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Research shows niche in older adult market for *Grandparents* magazine

Scan any large magazine rack and you'll find a publication aimed at every age group: Children, teenagers, parents and just recently, grandparents.

Better Homes & Gardens Grandparents, as it is simply but appropriately called, is the latest addition to Meredith Corp.'s special interest magazines. It was started because preliminary research revealed that there was a market for this vital group, one which Meredith has defined as age 50 or older.

According to Des Moines, Iowa-based Meredith, one of the country's leading publishers, the older adult market is this country's richest and fastest growing. In the next decade, adults over age 45 will increase 18% to 86 million. They account for more than 59% of discretionary income with the average mature American having 42% more to spend on personal choices than the average 25-34 year-old.

No available data

Before embarking on this publishing endeavor, Meredith's research department discovered that there were no data available specifically on grandparents or the number of people in this age group. This information was necessary, says Thomas Troland, "to confirm that this was a vital market, to influence the editorial direction of the magazine and to sell advertising."

That's when Troland, Meredith's research and promotion director for *Country Home*, *Wood*, *Midwest Living* and *Better Homes & Gardens* special interest publications, sought the help of Valley Forge Information Service, King of Prussia, Pa. Through QUEST™, the firm's national telephone omnibus survey, Troland and his staff got some much needed answers to some pertinent questions. The

survey, conducted in April, 1986, showed that of the 1,000 persons contacted, 35% said they were grandparents. That means that there are approximately 49 million grandparents in the U.S., says Troland.

Survey objectives

According to Troland, the survey had three objectives.

"We were interested in finding out how many grandparents there were. We wanted to arrive at a demographic profile of these individuals, and find out what the ages were of their grandchildren."

QUEST™ helped the research department develop a profile of the total market from which *Better Homes &*



Gardens Grandparents would draw its readership. The following figures represent target segments for the magazine:

- Market characteristics: Of the 49 million grandparents, 82% of them own their own homes;
- Grandparents age groups:
 - 45-49, 10.1%;
 - 50-54, 10.8%;
 - 55-64, 34.9%.
- 30% of the grandparents attended/graduated from college;
- 68% of the grandparents are married;
- Grandparents household income:
 - \$50,000+, 8.4%;
 - \$40,000-49,999, 4.5%;
 - \$35,000-39,999, 6.4%;
 - \$25,000-29,999, 8.5%.
- 31% of the grandparents have HHI of over \$30,000.
- Ages of their grandchildren:
 - 1-2 years, 27%;
 - 3-5 years, 42%;
 - 6-11 years, 47%.

Worthwhile investment

The research paid off. For the premier issue, which was mailed in January, 1987, the publication carried 20 pages of advertising. The second issue, which came out in late September, 1987, carried 35 pages.

The research also helped shape the wide variety of informative and entertaining features that appear in each issue. Subjects range from "how-to" on sharing hobbies to arranging memorable weekend excursions; handling

"The positive things about omnibus surveys are their speed and ability to get good basic information at not a lot of cost." Thomas Troland

"problem parents" to expert professional guidance on tax-free gifts and generation skipping trusts; sewing, knitting and baking with kids to adult-level projects for the grandparents themselves. *Grandparents* also features helpful service dealing with the grandparents' own lifestyle needs in travel, health and fitness, food, retire-

ment planning and financial management.

Since the telephone omnibus was conducted, Meredith has been able to access current data on the grandparent market through other sources. However, Troland holds high regard for omnibus surveys.

"The positive things about omnibus surveys are their speed and ability to get good basic information at not a lot of cost."

QUEST™ is Valley Forge Information Service's national telephone omnibus. Each month, it surveys 2,000 households on a national probability basis. Each month's survey is a fresh national sample, not a panel. Since all interviewing is done using the on-line CRT system, questions can be submitted 48 hours before the start of interviewing. Tabulated data for all closed-end questions are delivered 48 hours after the last day of interviewing. MRF

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SOURCES: 1987 MSA Profile, Woods & Poole Economics, Washington, DC; University of Florida, Bureau of Business and Economic Research.

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Data Use

Multivariate analysis - some vocabulary

By Gary Mullet

If you've been in marketing research as a client or a vendor for any longer than five minutes, you've undoubtedly heard (or thought that you did) something that sounded like, "After we regressed the eigenvalues on the discriminated clusters from the principle components maps, the factor loadings were clustered conjointly on the razzenfritzed centroidal variated hyacinths."

Well, to the neophyte in multivariate statistics, the above might as well have been what was actually said. Seems as if there are more buzzwords in statistics than in any other science and it also seems that some researchers try to use as many of them all at once if possible. Even when we're not really trying to impress someone, we're often forced to use several confused and confusing terms, just because there are no convenient alternatives.

Anyway, below you'll find several multivariate techniques listed, and I hope, defined for the user of marketing research (as opposed to the professional statistician). Within each broad topic, I'll try to tell you what the technique will do for you and also define some of the tool-specific words. Who knows, with a little practice you, too, may be able to say things like, "We really didn't need to consider the razzenfritzed centroidal variated hyacinths in this factor analysis." In each case, we're assuming that a sample of respondents have answered several questions on your survey.

Regression analysis

Regression analysis seems to be the grandfather of all multivariate analytical techniques. What it usually does is to find an equation which relates a variable of interest, such as amount consumed in the past 30 days, purchase intent, number of items owned or any other numeric variable, to one or more other demographic, psychographic or behavioral variables. The variable of interest is called the dependent or criterion variable, the others are the independent or predictor variables.

When the dependent variable is either purchase interest or overall opinion of a product, some researchers say that they are building a "driver model." They're trying to find which product attributes "drive" overall opinion of the test product, say.

The major thing to recognize in regression analysis is that the dependent variable is supposed to be a quantity such as how much, how many, how often, how far? The computer won't tell you if you've defined the variable of interest wrong, either, so it's up to you or your colleagues. Most regression models will leave you with an equation that shows only the predictor variables which are statistically significant. One misconception that many people have is that the statistically significant variables are also those which are substantive from a marketing perspective. They won't necessarily be. It's up to you to decide which are which. A couple of buzzwords that come primarily from regression analysis are:

- **Multicollinearity.** The degree to



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Data entry

- Elapsed time
- Data accuracy
- Cost
- Labor staffing
- Coding
- Peaks and valleys
- Other _____

Questionnaire preparation

- Last minute changes
- Flexibility
- Aesthetics
- Complex designs
- Assembling
- Typos
- Other _____

_____	_____
_____	_____
_____	_____

2. What is your typical number of respondents per survey?

- | | |
|-------------------------------------|-------------------------------------|
| <input type="radio"/> Less than 200 | <input type="radio"/> 2,001-5,000 |
| <input type="radio"/> 201-500 | <input type="radio"/> 5,001-10,000 |
| <input type="radio"/> 501-1,000 | <input type="radio"/> 10,001-20,000 |
| <input type="radio"/> 1,001-2,000 | <input type="radio"/> Over 20,000 |

3. How many surveys do you conduct per month?

- | | |
|----------------------------|-------------------------------|
| <input type="radio"/> 1-2 | <input type="radio"/> 11-25 |
| <input type="radio"/> 3-5 | <input type="radio"/> 26-50 |
| <input type="radio"/> 6-10 | <input type="radio"/> Over 50 |

4. How do you enter your data?

- Key entry minicomputer
- PC with key entry software
- CRT interviewing system
- Other _____

5. How do you prepare your Questionnaires?

- Word processing
- Computer software product
- Other _____

6. Would you consider using the SURVEY NETWORK™ system for your operation assuming you can reduce costs and it solves the problems you marked in the first question?

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- No
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which your predictor variables are correlated or redundant. In a nutshell, it's a measure of the extent that two or more variables are telling you the same thing.

• **R-squared.** A measure of the proportion of variance in, say, amount consumed that is accounted for by the variability in the other measures that are in your final equation. You shouldn't ignore it, but it's probably overemphasized.

There are a variety of ways to get to the final equation for your data but the thing to recognize for now is that if you want to build a relationship between a quantitative variable and one or more other variables (either quantitative or qualitative), regression analysis will probably get you started.

Discriminant analysis

Discriminant analysis is very similar to regression analysis, except that here the dependent variable will be a category: Brand used most often, product usage (heavy, medium, light, not aware). The output from a discriminant analysis will be one or more equations which can be used to put people (usually) with a given profile into the appropriate slot or pigeonhole. As with regression, the predictor variables can be a mixed bag of both qualitative and quantitative.

Again, the computer packages around won't save you from yourself and tell you when you should use regression analysis and when to use discriminant analysis, so you'll have to be on your toes. Also, you should be aware that the IRS is a big user of discriminant analysis. The categories of interest to them are "Audit" and "Don't Bother." You can imagine what the predictors are, especially if you're starting to fret over the new tax forms.

Marketing researchers frequently use discriminant analysis to profile users of various brands within a given product category. It's also used to determine what, if any, differences there are between, say, "Trier-acceptors," "Trier-rejecter" and "Non-triers." In the past it was heavily used in credit

scoring. It probably still is. As with regression, you need to be concerned with statistical vs. substantive significance, multicollinearity and R-squared (or its equivalent). Used correctly, it's a powerful tool since so much marketing research data is categorical.

Logistic regression

Logistic regression does the same

things as regression analysis as far as sorting out the significant predictor variables from the chaff, but the dependent variable is usually a 0-1 type, similar to discriminant analysis. However, rather than the usual regression type equation as output, a logistic regression gives the user an equation

continued on p. 33

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pers, provide retailing information regarding what stores are in a market. Such information can tell AR&P what share of the market a discount store like Kmart may have, what kind of demographic group the store appeals to, what products they buy, and what kind of lifestyle is characteristic of this demographic group.

Other data AR&P uses are regional and national in scope. One source it subscribes to is an economic forecaster called "WEFA," Wharton Econometrics Forecasting Associates. WEFA provides an economic analysis and other information like incomes of people by region and how much they spend.

Geodemographic data

Like many other retail development firms, AR&P uses a geodemographic service provided by a target marketing company. CONQUEST, a database from Donnelley Marketing Information Services, Stamford, Conn., associates consumer demographics to Census tracts, block groups, zip codes and



DAYTON HUDSON CORPORATION

trade areas. The Donnelley system can also be merged with another database AR&P uses called VOS, the Vehicle Origin study from R.L. Polk & Co. By combining the demographic capabilities of Donnelley and the geographic services of Polk, AR&P can do mapping which management likes, says Carlson, because maps are easy to read and understand.

With the VOS survey, license plates can be matched to addresses and then clustered by zip code and census tract. A trade area can be defined and then individual addresses can be plotted in printed form.

AR&P has also developed an inter-

nal data file which records information on its own stores and competitors' stores. The system provides information on the trade area for all its stores as well as their sales data and growth. Competitors' trade area information is also available.

Competitor directories

In addition to this type of competitive information, AR&P subscribes to directories of their competitors' shopping centers, specialty stores and discount stores. AR&P analysts also routinely visit competitor store sites and "size" them to find out such things as what types of customers they're reaching, the stores' volume of traffic, and to estimate sales.

While part of AR&P's function used to involve consumer research, that function has over the past six to eight years been handled by two outside vendors, Campbell & Associates and Consumer Research Corp. Typically, these firms conduct exclusive studies on particular stores that request a study, for example, to find out how the customer base has changed, or to examine a store's service component. Once in awhile, AR&P needs con-

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sumer research to do some work, says Carlson.

"If we're going into a new market, we want to find out where people shop, or if a particular strategy will work, or to see if we're underpenetrating a certain market."

To find that out, the vendor will develop a demographic and lifestyle profile and plot the trade area and then match that profile with the profile of the shoppers in the area.

Another support function AR&P assumes, however far more limiting than site analysis support, is strategic planning. While the major responsibility of this function is left up to Dayton-Hudson's chairman, AR&P will assist the company in analyzing the size of a

"We provide all front-end information from where to locate and how many stores to build, to sales estimates and total market strategies." Larry E. Carlson

market, help decide whether it's feasible to go after it, and to advise in general on broad strategic planning issues.

The whole picture

Examining and forecasting long-term developments of a market are critical for Dayton-Hudson Corp. because millions of dollars are at stake. That's why it's important that its analysts understand more than a market's regional setting or physical environment. They must be attuned to the broader issues relating to a market's economy.

In the case of a city like Detroit, for example, the analysts must ask themselves, how volatile is its economy? What's going to happen to the auto industry and how will it affect the long-term scenario in terms of the city's income growth?

"We might spend hundreds of millions of dollars putting up stores in Detroit or other key markets," comments Carlson. "Without examining the economy and without the proper research support, we can't afford to invest." **MRR**

It's no joke

It's no joking matter among management. Having a sense of humor is important, most personnel chiefs say, but 60% consider it inappropriate when dealing with company officers.

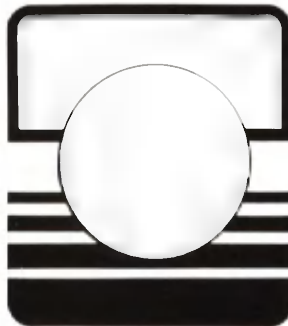
Chairmen sleep well

More than half of surveyed chairmen of major corporations sleep at least seven hours a night, says recruiter Howard-Sloan, Inc. Also, few

smoke, most watch what they eat yet half admit they could lose a few pounds.

Better earnings

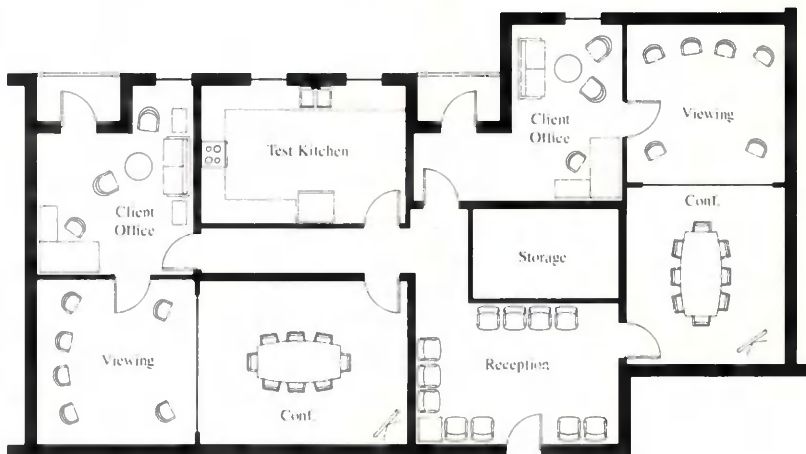
Compared with firms run by autocratic bosses, companies that involve a broad range of executives in the decision-making process earn far better returns on investment, reveals a study by consultant Hay Group, the Strategic Planning Institute and the University of Michigan.



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Conducting qualitative

By Dana and Brett Blackwell

Art Linkletter proved long ago that children are open and honest, even to the point of humorous embarrassment. They appear to reflect what they hear and see very forthrightly.

Indeed, everyone has probably heard the story of the elementary school teacher who asked a child in her class to spell relief and received R-O-L-A-I-D-S as the answer.

However, child research is serious if not difficult business. This may confound the uninitiated individual who thinks of the child as a sort of small-sized, underdeveloped and simplistic adult human being. Those persons who have been initiated into the world of qualitative children research are wise to the realities present, having found that in many ways children are a more complex population segment, that communicating with children to uncover in-depth insight and meaningful information is more difficult than communicating with adults, and that analyzing the information obtained can also involve complexities not present in adult marketing research.

The use of qualitative research with children is recommended as one of the better and more effective methodological tools of inquiry. Appropriately designed and conducted, qualitative research communicates with the child in his or her language, on his or her level, providing the unique opportunity of understanding the child consumer in his or her own terms. The following review is intended to provide a checklist of concerns to be aware of and overcome when providing "appropriately designed and conducted" children qualitative marketing research.

Recruiting participants

The first area of concern generally encountered in children research is in recruiting, screening and qualifying potential participants. Basically stated, it is difficult to recruit representative children who feel comfortable enough together to express their opinions and express them independent of the influ-

ence of peer respondents. Years of fielding children research projects have suggested that the following recruiting precautions be taken to minimize potential problems:

1. Recruit male and female children for separate groups, as mixing sexes often leads to inhibition and/or game playing.

2. Recruit children of similar age and grade levels, and don't recruit children younger than six years of age for standard-sized focus groups, as younger children may have difficulty expressing themselves in a larger group situation. As a rule, recruit by grade level rather than by chronological age to ensure equality of thought and expression.

3. When feasible, recruit children for discussion groups to contain only two grade levels, as wider disparity often inhibits the younger respondent(s) who may naturally defer to the older-aged, higher grade child.

4. Recruit children who are articulate and can express themselves in a group situation. It may be feasible to recruit children in pairs by recruiting one child and then recruiting a qualified friend, for this overcomes feelings of isolation in the group makeup. (However, this may encourage "side talking" when close friends are seated together).

5. Schedule research for hours/days when children, particularly younger children, will not be too tired and exhausted to actively participate in the group process. (For the child researcher, this, unfortunately, may mean moderating on Saturdays and Sundays).

Creating proper atmosphere

The second area of concern is the qualitative research environment which, without experience and care, can become a substitute classroom with inherent schoolroom taboos and expectations which may inhibit the child respondent. Here again, training and experience suggest certain procedural precautions that will diminish this "schoolroom syndrome."

1. Create a friendly, positive two-way atmosphere. Have the moderator informally introduce herself/himself and conduct "small-talk" while children are waiting in the lobby;

Provide refreshments (in the lobby) that are age appropriate;

Where possible, use a bright, cheerful room. A conference setting is alright and sometimes preferred (to a living room setting) if the chairs are high enough and the table not too big for the number of children participating.

2. Tell children that the group is not like a class, that there are no wrong answers, that disagreement and different opinions are OK, and that their individual participation in terms of "speaking up" is very important. Most important, the moderator must be trained and experienced in providing positive behavior reinforcement for serious (not silly) communications.

3. As time permits, open the research discussion with a topic that is of interest and is non-threatening to participating children. Sometimes an initial planned exercise in creative thinking and opinion stating can result in enhanced objectivity for subsequent research discussions.

Selecting the technique

There are a number of qualitative techniques which have been developed



research with children

and proven effective in accomplishing marketing research with children. While some of these techniques are also utilized in conducting adult qualitative research, their implication and application may vary for children use.

These techniques are:

- Ideation sessions
- In-depth interviews
- Friendship triads
- Mini-groups
- Focus groups; standard groups and peer leader groups.
- Stacked™ groups.

Ideation sessions: These are informal, creative-thinking, brainstorming sessions conducted in a casual, relaxed environment with select, screened children who are considered to be innovators and trendsetters in lifestyle, language, leisure and fashion factors by peers and/or adults. (For research efficacy, as well as cost and timing considerations, it is recommended that these innovative children be prerecruited and personally screened for inclusion into an on-going panel for longitudinal tracking and ideation use).

These highly interactive sessions will last from 3-3½ hours and interface six-seven select children with four-five select adults. The participating adults will be provided by both client and supplier and encompass work functions/areas such as research moderator, co-moderator, advanced research, research and development and brand planning/management. Creative thinking exercises and brainstorming techniques are utilized as planned procedures to facilitate innovative thinking and discussion.

The Creative Group, Inc., is a full-service marketing, consulting and research firm with corporate headquarters in Farmington Hills, Detroit, and a research branch in Redwood City, San Francisco. The Creative Group is comprised of four functioning research divisions: TrendFacts Research, TrendFacts Field Services, PlayLab Research, Mercadotecnia Consulting, and ComputerFacts Analytical.

In-depth interviews: Commonly referred to as "one-on-ones," these unstructured, in-depth personal interviews may range from 15-30 minutes in length, depending upon the age of the children being interviewed, and should be conducted/moderated by an experienced research professional who will be providing the research analysis and report preparation. By virtue of the professional time involved, in-depth interviews are lengthy, fatiguing (i.e., moderator "wear-out"), and not inexpensive, but they also can provide valuable individual, independent, in-depth insight and understanding not influenced by the interaction dynamics of the group discussion process.

Friendship triads: Interviewing three children at a time produces a hybrid discussion that may last 15-45 minutes, somewhat in between multiple in-depth interviews and a mini-group discussion session. If the triad is a friendship triad, there usually is some sort of mutual encouragement to talk and participate in a familiar, close knit environment that lacks the uncomfortableness of a larger group structure. Friendship triads are those involving three playmates of the same or similar age and sex and both their strength and limitation involve the already-established, inherent group communication patterns, structure and possible bias. However, triads remain a popular technique for providing moderator contact with and control of younger children respondents. Indeed, the use of triads allows the professional moderator to research four- and five-year-old children and permits moderator demonstration and controlled respondent handling of fragile and/or expensive product prototypes and/or packaging.

Mini-groups: Mini-groups differ from standard focus groups simply by being shorter in length (viz., from 30-



Brett Blackwell is co-founder and president of the Creative Group, Inc. Blackwell has 20 years of marketing, planning and research experience with General Mills, Warner-Lambert and Dow Corning.



Dana Blackwell is co-founder and executive vice-president of qualitative research for PlayLab Research, a division of the Creative Group, Inc., that specializes in children marketing research. She has 10 years of marketing and advertising research experience encompassing consumer packaged foods and beverages, candy/gum, snacks, fast food, household goods, toys/games, personal health and beauty aids, broadcasting and advertising.

continued on p. 26

60+ minutes vs. 1 1/2-2 hours) and involving fewer participants viz., four-six vs. eight-10 children. Mini-groups are excellent for younger-aged children, five-seven years of age, because they allow for in-depth probing of individual discussants within a shorter, less tiring time frame.

As a rule, the younger the age of the children participants, the smaller the size and the shorter the length of the mini-group. Mini-friendship groups permit the recruitment of friends and

The researcher must bring to the analysis a firm understanding of the psychological/social/intellectual stages of child development.

may involve from two-three pairs of playmate participants.

Mini-groups are extensively utilized in children marketing research, especially for preliminary concept and/or prototype research involving targeted younger children viz., five-six years and/or an initial broader age range of children e.g., five-10 years. While the reduced number of participants and limited time frame appear to be limitations of a mini-group, they actually provide a number of unique opportunities. Mini-focus group sessions can be conducted more quickly and at less expense than standard children focus groups, thus providing a greater number of different profiles or segments within the scope of a research study. Where critical for research and scheduling purposes, a professional moderator can facilitate three or four mini-groups on a weekday after school, compared to just two or three standard focus groups.

Most important is that the mini-group provides a more comfortable and less inhibiting environment that allows for more in-depth and/or more spontaneous responses, particularly from younger children that may become lost in larger group situations. As with triads, mini-groups are excel-

lent for allowing children personal product contact, providing controlled hands-on experience with prototypes such as toys and games.

Focus groups: Focus groups are extensively used in qualitative marketing research conducted among children, youths, teenagers and young adults. These guided but unstructured discussions are effectively utilized to develop in-depth insight and understanding of children's personal opinions, attitudes, perceptions and preferences.

Standard groups: Standard children focus group research involves having a qualified, trained and experienced research person professionally moderate and analyze a focused group discussion session with representative but articulate children participants/discussants recruited and prescreened on the basis of a predetermined number of qualification attributes and/or specification criteria. A standard child focus group will involve eight-10 participants and take from 1 1/2-2 hours to complete. In deference to adult focus groups, fewer respondents, viz., eight children, and a shorter discussion duration, viz., 1 1/2 hours, are preferred.

Peer leader groups: Peer focus groups encompass a unique focus group technique that was developed in response and as a solution to ineffective focus groups conducted among "representative" children. The peer leader group is comprised of peer group leaders, those children who distinguish themselves among other children by virtue of one or more factors that would include social development, verbal acuity, motor skills, physical appearance, and usually, but not always, higher intelligence (e.g., a gym shoe concept would target sports

leaders, but may also include fashion leaders).

These peer leader children are best identified for recruitment screening and qualification by adults who are actively involved with children, such as teachers, coaches, club leaders, as well as by parents and children themselves. The key recruitment process is a three- or four-step procedure involving field identification, qualification and recruitment, followed by optional professional personal screening of potential participants (e.g., particularly for possible inclusion into an on-going focus group pool or panel).

Peer leader group recruitment pre-empts conducting qualitative research with quiet, shy children who may be too nervous or uncomfortable to give their own opinions and it generally pre-empts individual hyperactivity and trouble-making behavior. Most importantly, it reduces the impact that children have upon each other, minimizing the "jumping on the bandwagon" effect that can result from the influence

Appropriately designed and conducted, qualitative research communicates with the child in his or her language, on his or her level, providing the unique opportunity of understanding the child consumer in his or her own terms.

of group leaders upon group followers.

The benefits of this more difficult and expensive recruitment procedure are inherent in the personal characteristics of peer group leaders. These are:

- They understand and cooperate better
- They are generally brighter and more aware
- They are more confident and independent in their thinking. (They may or may not be more creative and innovative).
- They are typically more descrip-



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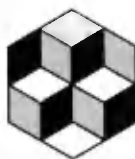


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(CDC), the Georgia Department of Human Resources and the Department of Health in Dekalb County, a suburban county east of Atlanta, conducted two surveys on seat-belt use in the county in July, 1986.

The telephone interview of 337 drivers revealed that 127, or 38%, said they buckled up only sometimes, seldom or never. Yet when researchers staked out at 48 randomly selected intersections and checked drivers of 2,157 cars stopped at lights, a whopping 70% weren't wearing the safety device, the CDC reported.

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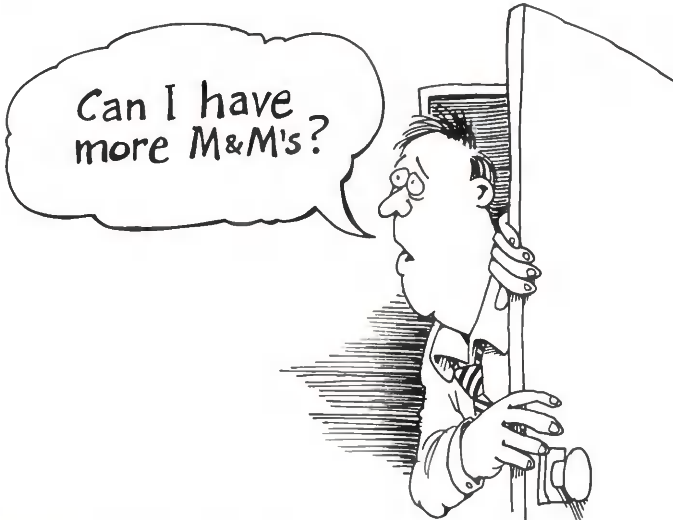
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"JMB/Federated

continued from p. 10

ated Market Research works in conjunction with JMB Realty in Chicago to decide on properties for future acquisition or development of major regional shopping centers and to evaluate the overall feasibility of these projects," says Andrew.

From the earliest projects, the company has worked with the top names in retailing. Department stores such as Bloomingdale's, Saks Fifth Avenue, Burdines, Foley's, Lord & Taylor, Mervyn's, Jordan Marsh, Dillard's and Sears form the basis of the company's project strength.

Market feasibility work identifies the scale, demographics and expenditure potential for areas that would be served by a shopping center site, explains Olson. Along with data from the Census Bureau, various planning agencies and National Planning Data Corp., JMB/Federated Market Research uses NDS to look at the potential of the market served by a proposed site. A lot of mapping is done as well, says Olson, to provide graphic illustration of population distribution and population growth trends in the area which are then related to the prospective market. Demographic information, such as income levels and age groups, is also mapped out.

"Once we look at income, we can develop expenditure reports and projections. These reports provide the basic data for feasibility analysis of a shopping mall in a market," explains Olson.

Strategic or long-range planning involves the use of statistical models which aid the company in understanding the relationship between population and retail space and in identifying "overstored and understored" markets. Notes Andrew, "Analysis of emerging and changing demographics within market areas pinpoints future opportunities for center development in the period to the year 2000 and beyond." MRR

All for ice cream

On an annual basis, the average American consumes 15.1 quarts of ice cream annually, according to the International Ice Cream Assn. The most popular flavor is vanilla with 31% share of the market. The following shows how the other flavors rank in popularity and their share of the market:

- Chocolate, 8.8
- Neapolitan, 6.2
- Vanilla fudge, 4.2
- Cookies 'n cream, 3.9
- Butter pecan, 3.8
- Chocolate chip, 3.6
- Strawberry, 3.5
- Rocky road, 1.3
- Tin roof sundae, 1.3
- Cherry, 1.3

That'll be charge

Fifty-percent of households have Visa and Sears credit cards, the two most popular credit cards mentioned among surveyed consumers. For other credit cards, Opinion Research Corp.'s study showed that 42% of surveyed households have MasterCard; 40%, JC Penney; 35%, telephone; 34%, gasoline; 18%, no cards; 17%, Wards; 14%, American Express (green card); 45%, other department stores.

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NAMES OF NOTE

Response Analysis Corp., Princeton, NJ, has promoted **Michael Mitrano** to vice president. He joined the firm in 1983 as controller and became treasurer in 1986, a title he retains. Re-joining RAC is **Debbie R. Stern** as senior research director, financial services group. She had been with the company from 1981-1983 and was most recently at Synergistics Research Group. Joining the company is **Charles Schneider** as product claims research director.

Amigo Business Computers, Wilton, CT, a dealership specializing in Commodore-brand turnkey business computer systems has been formed. The company markets hardware and a variety of business software packages, including a turnkey microsoftware system for market research companies. **Henry T. Teller** is president.

Consumer Pulse, Inc., announces two promotions: **Angie Abell**, formerly of Consumer Pulse of Houston, as director of the company's Los Angeles facility. **Carolyn Kiel**, formerly of Consumer Pulse of Philadelphia and

Conway Milliken, as director of CPI's Milwaukee facility.

Frank Pleticha has joined Starmark as Adfax director. **Starmark** also announces a change of address to: 240 E. Ontario, Chicago, IL 60611. Telephone: (312) 944-6700.

Paul W. Spence has joined Smith, Bucklin & Associates, Chicago, as research manager. He was previously research manager with Starmark.

Joining Total Research Corp., Princeton, NJ, is **Jeffrey Lorber** as director of telephone operations. He was previously president of WATS Interviewing Network. **Robert M. Davis** becomes chief financial officer and **Samuel Reed** chief statistician. Previously Davis was an independent consultant. **Paul J. Consino** has joined Maritz Marketing Research, Inc., St. Louis, as a senior account manager. He was most recently with MARTELL Research.

Vicky L. Stevens has joined the Datafax Co., Inc., Maitland, FL, as director of field services. She previously held positions as field director at Elrick & Lavidge, Inc., and at Opinion Research Corp.'s West Coast office.



Stevens

Fields

Carl V. Fields has been named director of planning and development at Monterey Mushrooms, Santa Cruz, CA. He is responsible for assessing new business opportunities, directing market research activities and assisting the company's president in external growth activities. Fields was most recently a key member of the company's business development team in process operations.

Jenifer Moss has joined Murdoch Magazines, Secaucus, NJ, as research manager for *Meetings & Conventions* magazine and the *Official Meeting Facilities Guide*. She was previously a research associate with Opinion Research Corp., Princeton, NJ.

Per Mar Research announces a new field director in its Davenport, Iowa, office. **Martha Wade-Renk** was formerly associate field director for Stockton, Ott & Bortner, Inc., New York. In her previous position, she managed large probability studies, nationwide telephone projects, mall intercepts, new product testing and tracking studies. She was also involved in all phases of project planning, including questionnaire development and data analysis.

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The Wright Group has moved to 6848 Spring Valley Rd., #A, Dallas, TX, 75240. Telephone: (214) 233-1978. Leslie A. Root joins the staff as vice president.

Direct Response Broadcasting Network, Inc., announces an expansion and relocation of its offices to One Reading Center, 1101 Market St., Ste. 1300, Philadelphia. Part of the company's expansion includes new state-of-the-art telephone communication and computer systems and modern kitchen facility.

Sherri Neuwirth was named general manager of Elrick & Lavidge, Inc., Chicago. After joining the company in 1980, she was named a vice president in 1985. In March, 1987, she transferred to the New York office on a special assignment.

Promoted at Bayer Bess Vanderwarker & Flynn, Inc., Advertising, Chicago, is Jan Jaffee to executive vice president, strategic planning and research director.



Jaffee

Dupont

Dr. Thomas D. Dupont has been promoted to executive vice president, Oxtoby-Smith, New York City, a marketing and consulting firm. He was previously senior vice president with responsibility for the research activities of the Block Drug Co., MCI Telecommunications Corp., and Coca-Cola Foods.

Total Research Corp., Princeton, NJ, announces several promotions and additions to the company: Lynn M. Morton to vice president, research staff director, from research director. In her new position, Morton will supervise a research staff of 18 people and recruit, hire, train and evaluate staff members. Melanie Edwards Rys

continued on p. 32

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Names Of Note

continued from p. 31

to vice president. She will be responsi-

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ble for the company's involvement in hotel, travel and leisure research segments as well as services quality research. Joining the company is **Lawrence J. Nusser** as manager of client services; **James M. Salter II**, as director of sales and marketing, proprietary technologies; **Nicholas J. Tortorello** as vice president of operations and public affairs research; and **Ken Zeldis** as senior project director.

Audits & Surveys, New York, announces two promotions: **Michael Fallig** and **Edward Bergstein**, vice presidents in the company's survey division, from senior project directors.

Joining R.H. Bruskin Associates, Princeton, NJ, is **Bert Kohn**, vice president, general manager, West Coast operations, from director of market research, Foodmaker, San Diego.

Focus Suites of Philadelphia opened its new facility Feb. 15, 1988. The facility has three private three-room suites, each including a large focus group room, a spacious multi-tiered observation room and a comfortable client lounge with food service and audio/video input. Also available is an observable test kitchen and observable one-on-one room. **Toni Gahbe** is director. (215) 667-1110.

Quality Controlled Services has

opened a new marketing research data collection facility at the President's Plaza, 4904 Eisenhower Blvd., Ste. 160, Tampa, FL 33634. Telephone: (813) 875-7746. **Suzanne Lucas**, who has worked in the Tampa market as manager of a telephone survey center for the past two years, has been named branch manager.

Promoted at Foote, Cone & Belding Communications, Chicago, is **Richard Vaughn** to executive vice president- corporate director of research and planning, from director of strategic planning, Foote, Cone & Belding, Los Angeles.

Liuda Piekarski has been named research manager of Directory Data, a division of Survey Sampling, Inc., Fairfield, CT. She was formerly database manager.



Piekarski

Petrillo

United Marketing Research, Lubbock, TX, a division of United Marketing Services, has named **James E. Petrillo** director of sales. Petrillo, with more than five years experience in market research, will be responsible for new business development and maintenance of existing accounts.

Promoted at DDB Needham Worldwide, Chicago, is **Lois Welch** to associate research director.

The Marketing Research Workshop, Inc., Fort Lee, NJ, announces an affiliation with **Personal Opinion, Inc.**, Louisville, that will provide its clients with expanded production capacity and state-of-the-art computerized interviewing. The combined capacity of the two companies for telephone interviewing is now 50 lines. CRT's are on-line for telephone, mall and central location test interviewing. Contact Glenn Weissman, vice president manager, MRW, 1305 15th St., Fort Lee, NJ 07024. Telephone: (201) 461-5365. MRR

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with all of the predicted values constrained to be between 0 and 1.

Why bother? Most users of logistic regression use it to develop such things as probability of purchase from concept tests. If a given respondent gives positive purchase intent, they're coded as "1" in the input data set; a negative intent yields a "0" for the input. Now looking at both the demographics of the respondents and their product evaluation data, a model is built that allows the researcher to say things like, "Males aged 35-49 have a .87 probability to buy this product, females who are between 18-35 have a .43 chance,..." It can also be used instead of discriminant analysis when there are only two categories of interest.

Factor analysis

There are several different methodologies which wear the guise of factor analysis. Generally, they're all attempting to do the same thing. Find groups, chunks, clumps or segments of variables which are correlated within the chunk and uncorrelated with those in the other chunks. The chunks are called factors.

Most factor analyses depend on the correlation matrix of all pairs of variables across all of the respondents in the sample. Also, as it is commonly used, factor analysis refers to grouping the variables or items in your questionnaire together. However, Q-factor refers to putting the respondents together, again by similarity of their answers to a given set of questions. Two of the troublesome terms from factor analysis are:

- **Eigenvalue.** Although mathematicians would blanch, all you really need to know about eigenvalues in a factor analysis is that they add up to the number of variables that you started with and each one is proportional to the amount of variance explained by a given factor. Analysts use eigenvalues to help decide when a factor analysis is a good one and also how many factors they'll use in a given analysis.

- **Rotation.** In addition to doing it to your tires, doing it to an initial set of factors will give a result that will be much easier to interpret. It's a result of rotation that labels such as "price sen-

sitive," "convenience" and so on are applied to the factor.

Although the literature says that factor analysis should only be done on quantitative variables, we've seen some that are very understandable when conducted on yes-no type variables as well. As with most multivariate procedures, that seems to be the bottom line for factor analysis: Does it make sense? If yes, it's a good one; otherwise it's probably not, irrespective of what the eigenvalues say.

Cluster analysis

Now the clumps of interest are respondents, instead of variables. As with factor analysis, there are a number of algorithms around to do cluster analysis. Also, clusters are usually not formed on the basis of correlation coefficients. They usually look at squared differences between respondents on the actual variables you're using to cluster. If two respondents have a large squared difference (relative to other pairs of respondents) they end up in different clusters. If the squared differences are small, they go into the same cluster.

One word of caution. Not all cluster software can easily handle categorical variables. For instance, if you're trying to cluster using brand used most often, which has four categories, you need to be sure to use a program which will cluster such nominal scale responses. Otherwise, you'll get a cluster mean on brand of 2.34 or some such, which is tough to interpret, at best. Most cluster programs do OK on either quantitative data or yes-no type data. A couple do handle multiple categories as well.

Perceptual mapping

A perceptual map can be used to show relative similarities between such things as:

A. Brands

- B. Product attributes
- C. Both
- D. Cluster groups
- E. Factor scores
- F. Most anything else of interest in marketing research.

An appropriate map can serve as an excellent data summary and presentation device. Several of the mapping programs do much the same as factor analysis. Some use regression. You can also map the results of a discriminant analysis.

One major thing to remember when you're faced with a perceptual map: What you see is only a two-dimensional picture of the interrelationships in your data set. It may take three or more dimensions to adequately represent your data; hence, your two-dimensional view might be leading you astray.

Most mapping procedures provide a measure or two of how well the two-dimensional map captures the data relationships. Be sure that you are given these measures.

Another thing to keep in mind is that many maps are going to show you relative positioning or differences and not absolutes. Factor analysis, being based on correlations, does this too.

Combinations

At the risk of going overboard, again, on jargon, some studies use combinations of techniques. For instance, each brand might be scored on the factor results. Then, brands are used as criterion variables with factor scores to discriminate between them. A driver model might be evaluated for each brand using the raw data (not factored) and respondents could be clustered on their perceptions of a single brand plus their demographics. A perceptual map is constructed showing the cluster groups and brand ratings, another from the discriminate analysis. This is not on a typical scenario.

Ask, then invest

It's easy to overwhelm and be overwhelmed by the vocabulary alone of multivariate data analysis, let alone the interpretation of the same. Adding to the problem is computer literacy without attendant statistical literacy. Most programs/packages will do whatever analyses you request on whichever data you feed them. With the above information, I hope that as a minimum, you'll be able to ask the right questions before investing in an unwarranted multivariate procedure. MRR

Gary Mullet recently joined the faculty at Georgia Institute of Technology after spending over five years with Sophisticated Data Research in Atlanta. In addition to teaching and research, he is serving as a staff consultant with SDR. He has previous work experience at Burke Marketing Research and has taught at the Universities of Michigan and Cincinnati. The author of numerous articles on applied statistics, Mullet is also an active member at meetings of various professional societies.

QUALITATIVE RESEARCH/FOCUS GROUP MODERATORS

Listed below are names of companies specializing in focus groups. Included are contact personnel, addresses and phone numbers. Companies are listed alphabetically and are also classified by state and specialty for your convenience. Contact publisher for rates: *Quirk's Marketing Research Review*, P.O. Box 23536, Minneapolis, MN 55423, 612/861-8051.

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Consumer, Retail, Banking,
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Naperville, IL 60540
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Contact: Maureen Skrilow, Prin.
Spec. In Focus Groups & Depth
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305/266-0550
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Chevy Chase, MD 20815
301/652-3632
Contact: Jo Ann Hairston
Adv/Black/Consumers/Finc Svcs/
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Rockwood Research Corp.
1751 W. County Road B
St. Paul, MN 55113
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High Tech, Executives, Bus.-To-
Bus., Ag, Specifying Engineers

Schrader Rsch. & Rating Svce.
South River Road
Cranbury, NJ 08512
609/395-1200 or 800/257-9440
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312/943-0114
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Moraga, CA 94556
415/376-1924
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Decatur, GA 30030
404/373-7171
Contact: Joyce A. McGriff
Exp Moderator-Gen'l Mkt/Blk
Adv, HBA, Food, Bev, Health Care

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San Diego, CA 92103
619/299-6368
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Farmington Hills, MI 48018
313/855-7810
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Hi-Tech, Industrial, Financial
Health Care, Consumer, Retail

Trotta Associates
13160 Mindanao Way/Ste 180
Marina del Rey, CA 90291
213/306-6866
Contact: Diane Trotta
Focus Group Facs & Moderator
w/20 Yrs Exp. Bus-To-Bus & Cons

Youth Research/CSI
Brookfield Commons B-22
246 Federal Rd.
Brookfield, CT 06804
203/797-0666
Contact: Karen Forcade
Consultants In Mktg To Children
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Southeastern Inst. of Rsch.

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Consumer Opinion Services
M.L. Moss & Company

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Thonger Qualitative Research

Child supervisors

The Census Bureau reports that after school, in households where mothers are employed full-time, these percentages of children age 5-13 are supervised by:

- A parent, 54%
- Another adult, 32%
- No adult, 14%.

Pension eligibility

Among surveyed companies, these percentages show when their employees are eligible to participate in pension plans:

- At age 21 and one year of service, 45%
- Immediately, 24%
- After one year of service, 15%
- Other, 16%.

tive of new ideas and trends.

As such, peer group leaders tend to better understand and empathize with the goals of a group, and because of this, they tend to be more cooperative in working toward group goals. They are generally brighter and more creative than other children. They are generally more aware of the world around them, including the preferences and prejudices of their peers.

More importantly, they are able to reflect more productively on questions posed to them. They tend to be independent thinkers who express how they individually feel and are not "swayed" to follow the crowd. They generally are more confident and competent than their peers which allows them to better express their individual thoughts on any given topic matter.

Stacked™ groups: This unique focus group concept originated from the realization that children's products are often bought or not bought in response to a joint purchasing decision, a realization that children and parents have an interdependent effect upon many purchasing decisions. The Stacked focus group is utilized to uncover accurate, objective information where a split specification/purchase decision may exist between two persons, such as between a child and his/her parent (or between a wife and husband).

This research technique is based upon the rationale that a great many decisions to purchase certain products and services results from children and parent interaction regarding products/services they either are aware of, have experience with, and/or have seen/heard advertised on television, radio or in print.

Stacked groups are focus groups which include the participation of children and their parents, usually mothers. This innovative focus group technique was borrowed from psychology and group therapy techniques. For example, in a Stacked child/mother group, the child sits around a table and the mother sits directly behind but does not speak to, touch, or influence her child. The specially-trained moderator leads a discussion with the children for 45-90 minutes, after which they leave (i.e., return to the lobby) and the group session is continued

with the mothers for another 30-45 minutes. At the end of the two discussion sessions, the original children discussants are invited back into the focus group room to develop some final interactive dialogue between and consensus thinking from both children and mothers.

In the Stacked focus group, the first discussion session (with children) is used to probe the opinions, perceptions and preferences of the children discussants. The second discussion session (with mothers) is used to obtain commentary and response to the children's comments and to gain further insight into and to add to the information provided by the initial children discussants.

The value of the Stacked group technique stems from the ability to gain insight from the child and the parent and the ability to gain interactive insight as well. In other words, each child and parent not only gives his or her opinions of the product, but also gives his reactions to the other's responses (more so for the parent than the child).

As such, one Stacked child/parent group is better than one standard child group and is even better than one child group and one parent group, for it creates three group opportunities in one session. By combining the interactive responses of children and parents into one group, this group technique not only produces more reliable research but also provides significant time and cost savings.

Moderating effectively

For the qualitative researcher, working effectively with children requires extensive training and experience, as well as a continuing presence in the children marketing research market-



place. Because children are not adults, they must be communicated with and treated differently to produce valid research results. Therefore, a number of children qualitative research axioms must be accomplished in the process of moderating children focus groups:

1. The moderator must speak the language of children

2. The moderator should prepare for the sessions by developing discussion questions and stimuli which are age/grade and sex appropriate

3. The moderator must understand and be able to work with group dynamics as they uniquely operate among children

4. The moderator must have an understanding of the psychological/social / intellectual / developmental stages of children, and

5. The moderator must know how to provide positive behavior reinforcement and control children without seeming to do so.

Analyzing results

Analysis and interpretation of children research findings is perhaps the most intriguing and complex problem of all. It is caused by the dynamics of child development and its impact on the information generated during the research process and it demands certain skills of the researcher that designs, conducts, and analyzes qualitative research with children. Three of these are:

1. In addition to having firm understanding of marketing and research concepts and principles, the researcher must bring to the analysis a firm understanding of the psychological/social/intellectual stages of child development.

2. In order to properly analyze and interpret the qualitative research information obtained, the researcher should fully understand (and be experienced with) group dynamics as they occur within children focus groups.

3. Children research experience, per se, in terms of the constant and cumulative conduct of children qualitative research, provides a depth of continual and changing knowledge that allows for accurate analysis and proper interpretation of research findings with the dynamic children marketplace(s). MRR

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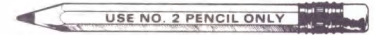
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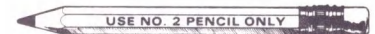
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COMPUTERS FOR MARKETING CORPORATION-Operates two service bureaus(Denver and San Francisco) which provide complete data processing services. Capabilities include data entry, cleaning, table production, and statistical testing using CFMC's proprietary software on the HP 3000.

CONSUMER & PROFESSIONAL RESEARCH, INC. -Offers a full spectrum of marketing research tabulation services including data entry, questionnaire coding, cross-tabulation and multi-variate statistical programs.

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NATIONAL COMPUTER SYSTEMS-Information Services is a full service computer service bureau offering optical mark reading and data processing of large scale surveys, educational tests, Pell Grant processing, Guaranteed Student Loan Processing, etc.

SIGMA RESEARCH CO.-CRT data entry, crosstabulation, verbatim coding. Client may do much of job at home or office.

DWIGHT SPENCER & ASSOCIATES, INC. -Provides comprehensive computer tabulation services including: state-of-the-art crosstabulation software, computerized data entry with electronic verification capabilities, CRT telephone interviewing, basic statistical computations including significance testing ability(T-Test and Chi-Square), trained in-house coding staff. Communications software available for transferring data to both micro and main frame computers. Eighteen computers in-house.

STRAWBERRY SOFTWARE, INC. -Strawberry Systems has had experience with over 4,000 projects since 1971. Specializes in tabulation and statistical analysis of research data. Provide assistance in design, coding, data entry, programming and processing of research data. Data tabulated at Strawberry is available in A-Cross format/A-Cross "RunTime" at no extra charge so clients can perform ancillary data analyses on their own PC.

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Section II - Statistical Analysis

COMPUTERS FOR MARKETING CORPORATION-Provides database consultation, set-up and on-going management. Staff is experienced in writing questionnaires for computer-assisted interviewing on the HP 3000 and PC's.

CONSUMER & PROFESSIONAL RESEARCH, INC.-Provides a full spectrum of statistical analysis services.

THE DATAFAX COMPANY-Offering a variety of statistical services including sophisticated statistical tests.

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Section III - Software Programs For Use With PC'S

ANALYTICAL COMPUTER SERVICE, INC.-ACS-QUERY is a CRT interviewing system that can be used for both telephone or on-site interviewing. It runs under MS-DOS.

BUSINESS RESEARCH & SURVEYS-TABULYZER professional software for survey analysis and camera-ready reports is easy to use; simple menus; tables on screen or printer. For IBM/PC and compatibles. Features include: easy data entry; verification; crosstabs and marginals; open-ended and multiple response questions; multiple banners; statistics; weighting; filtered analysis; labeling; editing; frequency counts and percentages(row, column, respondents, responses, nets); use with most spreadsheet and word processing programs.

COMPUTERS FOR MARKETING CORPORATION-PC SURVENT: Modular PC-based system for conducting computer-assisted interviewing, whether stand-alone (malls) or networked(telephone centers). Various modules enable users to write and administer questionnaires using complex logic conditions, lengthy response lists, etc. Network mode enables supervisor monitoring, on-line quota control, and other telephone interviewing requirements. **NANOPUNCH:** Key-To-Disk data entry system for IBM-PC's and compatibles. Designed to simulate the familiar IBM keypunch(including keyboard layout, use of "drum cards", etc.)for rapid, columnar-style data entry needs. Accepts single or multi-punched, alpha, numeric, or alphanumeric data, fields, ranges, etc.

DATALGICS-Annual membership program provides all PC based software in our library including: RxTAB Cross tab package, RxCON Conjoint analysis package, RxPrice price sensitivity package, and RxMap Perceptual Mapping program. Demo disks and tutorial disks available for most. Annual fee includes on-going updates and new programs as developed.

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MICROTAB, INCORPORATED-MICROTAB Cross Tabulation Software: Provided in three different editions with each designed with a specific range of needs in mind. Provides every data tabulation capability. Used by service bureaus, research suppliers, banks, newspapers, etc. Menu driven. **MICROTAB Data Manipulation Software:** Interacts with MICROTAB Cross Tabulation Software. Manipulates data and performs statistical tests. **MICROTAB One By One Plus S**

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"Software Signals New Era for Market Research"

— PC Week

Join the Sawtooth Software users described in this recent PC Week article and become one of the growing number of corporate research managers who are discovering that they can use PC software to do **"very sophisticated marketing research easily and inexpensively."**

With our Adaptive Conjoint Analysis System (ACA) you can:

- Design products and services that are more competitive
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- Identify and exploit new product opportunities
- Prevent market share erosion
- Simulate the effects of changes in your product or corporate image

ACA and APM have helped hundreds of research managers provide more valuable input to the corporate decision-making process. To learn how you can use software that is **"changing the face of the market research industry,"** just call or write.

Sawtooth Software

Product Information: 1007 Church St., Evanston, IL 60201 312/866-0870
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Viking Software
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DATABASE MANAGEMENT PROGRAMS

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Information Resources, Inc.
Leibowitz Market Research
Marketing Information Sys.
Microtab, Inc.
Orchard Products
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The Sachs Group
Sales & Marketing Sys.
Spring Systems
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Systat, Inc.
U.S. Statistics
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World Research Systems

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Detail Technologies
Downie-Pine Company
Dynacomp
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Marketing Software, Inc.
Mastersoft, Inc.
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Detail Technologies
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P-Stat, Inc.
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IMSI
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Market Action
National Computer Systems
National Planning Data Corp.
RCB Software
The Sachs Group
SAS Institute
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Spring Systems
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Systat, Inc.
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Spring Systems
SurveyTab
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Systat, Inc.

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Focus Research Systems
Market Action
Marketing Information Sys.
Marketing Software, Inc.
Market Share Modeling
Pulse Analytics

The Sachs Group
Scott Smith
SPSS, Inc.
Statistical Innovations
U.S. Statistics

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Datamap, Inc.
Decision Support Software
Donnelley Marketing Information
Leadtrack Services
SPSS, Inc.
Stolzberg Research
Strawberry Software
T/C/A
Walonick Associates

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Datalogics
Dynacomp
Mace, Inc.
Scott Smith
Spring Systems
Systat, Inc.

MULTINOMINAL LOGIT ANALYSIS

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Mace, Inc.
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"T" TEST

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Penton Software
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Smart Software
SPSS, Inc.
STSC
Systat, Inc.
TMS Systems
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Datanetics
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VOLUMETRIC ANALYSIS

Datamap, Inc.
T/C/A

Section IV - Software Programs For Use With Mainframes

ANALYTICAL COMPUTER SERVICE, INC. RESQUE: A flexible and efficient computer system for processing survey data. Provides for data cleaning, and reformatting, and provides final tables as well as a full range of statistical computations.

COMPUTERS FOR MARKETING CORPORATION SURVENT: A full featured minicomputer-based system for computer-assisted telephone interviewing. Provides capabilities for developing and administering complex questionnaire and sampling designs. Includes sophisticated logic control; rotations; etc., supervisor monitoring; management status reporting; quota control; and comprehensive telephone management including automatic callback scheduling and autodialer interface. **MENTOR:** A batch crosstabulation/reporting system for minicomputers. Includes all industry standard features such as weighting, ranking, nets, etc. Provides complete formatting flexibility. Utilities for cleaning and other data preparation requirements included. Fully integrated with SURVENT for streamlined tabulation of CRT studies. **MICROPUNCH:** A key-to-disk data entry system for the HP 3000. Designed to simulate the familiar IBM keypunch (including keyboard layout, use of "drum cards", etc.) for rapid, columnar-style data entry needs. Accepts single or multi-punched, alpha, numeric, or alphanumeric data, fields,

ranges, etc. Specially designed hardware buffer enables instantaneous response to keystrokes.

SIGMA RESEARCH CO.-EASYTAB™: A premier tabulation system for IBM, Prime and other 32 BIT Machines using Fortran.

SPSS, INC.-SPSS-X Data Analysis System: Contain integrated procedures for statistical analysis, data management, and report writing. Can run either interactively or in batch mode. Contains over 40 statistical routines from crosstabulation and descriptive statistics to multivariate analysis techniques including nonlinear regression and MANOVA. Data management facilities provide for the handling of complex file and subfile structures; adding cases to a file or merging two or more files; recoding of existing variables or creation of new ones; and sampling, selecting, and weighting of specific cases. Flexible report writer generates publication-ready reports in a variety of formats with a wide range of statistics automatically calculated. English syntax command structure requires no programming experience. Options include TABLES for summarizing multiple response data and producing high-quality stub and banner tables; and LISREL for estimating simultaneous equation models. **SPSS-X Tables:** Provides for easy handling of multiple response data; presenting multiple tables in one display; and

nesting multiple subtables in any dimension. Default formatting, statistics, labeling, and titling can be overridden giving the user complete control over layout and content of a table. Allows for any combination of table, row, column or subtable summary statistics including percentages, totals or means. There is no restriction on the number of cases nor on the physical size of the table. Requires SPSS-X Data Analysis System. **SPSS GRAPHICS:** A menu-driven presentation graphics package that can be used as a stand-alone or with SPSS-X Data Analysis System. Over 40 high-quality displays include bar, line, pie and statistical charts as well as text pages. Advanced mapping facilities provide two or three dimensional maps by county, state, or Canadian province, or country. Any number of multiple images can be combined into a single display. Internal data management capabilities include data aggregation, sorting cases, collapsing variable categories, and adding or omitting cases. Charts can be previewed on a graphics terminal before plotting on a hardcopy device. Complete library facility allows storing commonly used charts. **SPSS-X Capture For DATARIEVE:** Fully integrated option to SPSS-X for information retrieval. Can extract DATARIEVE information; produce publication-quality reports; analyze data directly from SPSS-X; combine data from various DATARIEVE domains to match, merge or add data into a single set of data; and tailor and clean the data to

user specifications. **SPSS-X Track for VAX/VMS:** Option to the SPSS-X Data Analysis System that turns complex data into clear decision making information. Provides system performance monitoring, capacity planning, system resource awareness and automates routine management tasks. **SPSS-X Capture for SOL/DS:** An option to SPSS-X for information retrieval designed for users with little or no SPSS-X experience. User can analyze and display reports; create reports and analyses based on the data maintained and updated; generate specific cases in a particular order with the SELECT statement; and produce publication-quality tables with the SPSS-X Tables option. **SPSS-X Trends:** A comprehensive time series analysis and forecasting and modeling tool for mainframes and minicomputers. Procedures include: two-stage least squares and weighted least squares regression; uni- and bivariate spectral analysis; and Box-Jenkins analysis based on state-of-the-art ARIMA algorithms. Also contains more than a dozen smoothing models, curve-fitting with over ten model choices, and three methods for estimating autoregressive models. Can test and compare fits among alternative models, as well as save and reuse models. Validation and forecasting periods can be saved and modified, and missing values can be correctly estimated with the latest statistical algorithms.

ANALYSIS OF VARIANCE

Computer Associates
CRC Information Sys.
Information Resources, Inc.
P-Stat, Inc.
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SPSS, Inc.
Systat, Inc.

BRAND SHARE ANALYSIS

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CANONICAL ANALYSIS

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CENSUS REPORTING PROGRAMS

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COMPREHENSIVE STATISTICAL PACKAGE

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Isaacs Computing Assoc.
P-Stat, Inc.
SAS Institute
Systat, Inc.

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Mitchell Management Sys.
T/C/A
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Devcom Mid-America
Donnelley Marketing Information Svcs.
Information Resources, Inc.
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SPSS, Inc.
Systat, Inc.

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Computer Associates
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Consulting, Hardware & Processing
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Data Tabulating Service
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Information Resources, Inc.
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Market Probe International
Mitchell Management Sys.
Perreault & Assoc.
P-Stat, Inc.
SAS Institute
Sigma Research
SPSS, Inc.
Systat, Inc.
T/C/A
World Research Systems

CRT DATA ENTRY

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Computers For Marketing Corp.
Devcom Mid-America
Downie-Pine Company
Marketing Info. Systems
Mitchell Management Sys.

CRT TELEPHONE INTERVIEWING

ACRS Div.
Coffman Systems
Computers For Marketing Corp.
CRC Information Sys.

DATABASE MANAGEMENT PROGRAM

Computers For Marketing Corp.
Coffman Systems
Computer Associates
Devcom Mid-America
Information Resources, Inc.
Marketing Info. Systems
Mitchell Management Sys.
P-Stat, Inc.
Systat, Inc.
U.S. Statistics
World Research Systems

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Coffman Systems
Consulting, Hardware & Processing
CRC Information Sys.
Downie-Pine Company
Hodges & Assoc.
Isaacs Computing Assoc.
Mitchell Management Sys.
P-Stat, Inc.
SAS Institute
SPSS, Inc.
Systat, Inc.
T/C/A
World Research Systems

DATA ENTRY

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DigiData Entry System
Downie-Pine Company
Mitchell Management Sys.
P-Stat, Inc.
SAS Institute
SPSS, Inc.
Systat, Inc.

DEMOGRAPHIC ANALYSIS

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Computer Associates
Donnelley Marketing Information
Information Resources, Inc.
Mitchell Management Sys.
P-Stat, Inc.
SPSS, Inc.
T/C/A
U.S. Statistics
World Research Systems

DISCRIMINANT ANALYSIS

Computer Associates
CRC Information Sys.
Information Resources, Inc.
P-Stat, Inc.
SAS Institute
SPSS, Inc.

**FACTOR ANALYSIS/
PRINCIPAL COMPONENT**

CRC Information Sys.
Information Resources, Inc.
Isaacs Computing Assoc.
P-Stat, Inc.
SPSS, Inc.
Systat, Inc.

FOCUS GROUP

Mitchell Management Sys.

GEOGRAPHIC INFORMATION SERVICE

Donnelley Marketing Information
GSI/Tactics
MPSI Systems, Inc.
U.S. Statistics

GRAPHIC DISPLAY

Computer Associates
Devcom Mid-America
Downie-Pine Company
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SPSS, Inc.
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INTERACTION/CLASSIFICATION ANALYSIS

Perreault & Assoc.
Statistical Innovation

INTERACTIVE TABULATIONS

Downie-Pine Company
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KEY TO DISK

Computers For Marketing Corp.

LOGIT/LOG-LINEAR ANALYSIS

SAS Institute
Systat, Inc.

MARKETING MATCHING

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MARKET SEGMENTATION

ACRS Div.
CRC Information Sys.
Marketing Info. Systems
Mitchell Management Sys.
Perreault & Assoc.
SPSS, Inc.
Statistical Innovation
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MEDIA ANALYSIS

Mitchell Management Sys.
SPSS, Inc.
T/C/A

MULTIDIMENSIONAL SCALING

Computer Associates
CRC Information Sys.
Information Resources, Inc.
SPSS, Inc.
Systat, Inc.

MULTINOMINAL LOGIT ANALYSIS

Caliper Corporation
Systat, Inc.

NON-PARAMETRIC STATISTICS

Computer Associates
P-Stat, Inc.
SAS Institute
SPSS, Inc.
Systat, Inc.

ON LINE DATA TABULATION

ACRS Div.
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PATTERN ANALYSIS

Computer Associates
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Mitchell Management Sys.
Systat, Inc.

PERCEPTUAL MAPPING

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PROGRAMMING LANGUAGE

P-Stat, Inc.
Systat, Inc.
T/C/A

QUADRANT ANALYSIS

Computer Associates
Information Resources, Inc.
T/C/A

QUESTIONNAIRE DESIGN LANGUAGE

ACRS Div.
Coffman Systems
Computers For Marketing Corp.
CRC Information Sys.
Downie-Pine Company

RANKING

ACRS Div.
Computer Associates
Computers For Marketing Corp.
Downie-Pine Company
Mitchell Management Sys.
P-Stat, Inc.
SAS Institute
Systat, Inc.
T/C/A
World Research Systems

REGRESSION/CORRELATION ANALYSIS

Computer Associates
CRC Information Sys.
Information Resources, Inc.
Isaacs Computing Assoc.
P-Stat, Inc.
SAS Institute
SPSS, Inc.
Systat, Inc.

SALES ANALYSIS

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Coffman Systems
Computer Associates
Devcom Mid-America
GMD Incorporated
GSI/Tactics
Information Resources, Inc.
Marketing Info. Systems
Mitchell Management Sys.
P-Stat, Inc.
SAS Institute
SPSS, Inc.

SALES DATABASE

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Devcom Mid-America
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Marketing Info. Systems
Mitchell Management Sys.
P-Stat, Inc.

SALES EFFECTIVENESS MEASUREMENT

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GMD Incorporated
GSI/Tactics
Information Resources, Inc.
Marketing Info. Systems
Mitchell Management Sys.
U.S. Statistics

SALES FORECASTING

Analytical Consultants Int'l
GSI/Tactics
Marketing Info. Systems
Mitchell Management Sys.
P-Stat, Inc.
SAS Institute
Spar, Inc.
SPSS, Inc.
Systat, Inc.
U.S. Statistics

SAMPLE SIZE DETERMINATION

Systat, Inc.

SAMPLE WEIGHTING

Computers For Marketing Corp.
CRC Information Sys.
Downie-Pine Company
P-Stat, Inc.
SPSS, Inc.
Systat, Inc.
T/C/A
World Research Systems

SIMULATION/MODELING

CRC Information Sys.
SPSS, Inc.
Systat, Inc.

SITE EVALUATION

Donnolley Marketing Information
U.S. Statistics

"T" TESTS

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Downie-Pine Company
Information Resources, Inc.
Isaacs Computing Assoc.
P-Stat, Inc.
SAS Institute
SPSS, Inc.
Systat, Inc.
T/C/A
World Research Systems

TABLE EDITING

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CRC Information Sys.
Downie-Pine Company
SPSS, Inc.
T/C/A
World Research Systems

TABULATION SYSTEMS

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Computers For Marketing Corp.
Consulting, Hardware & Processing
CRC Information Sys.
Downie-Pine Company
Information Resources, Inc.
Isaacs Computing Assoc.
Market Probe International
Perreault & Assoc.
P-Stat, Inc.
Sigma Research
T/C/A
U.S. Statistics
World Research Systems

**TELEPHONE INTERVIEWING
SYSTEM**

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Coffman System
Computers For Marketing Corp.
CRC Information Sys.

THURSTONE SCALING

Systat, Inc.

TIME-SERIES ANALYSIS

Computer Associates
Information Resources, Inc.
P-Stat, Inc.
SAS Institute
SPSS, Inc.
Systat, Inc.
U.S. Statistics

VERBATIM CODING

ACRS Div.
Computers For Marketing Corp.

VOLUMETRIC ANALYSIS

T/C/A

Americans approve worry about genetic engineering

Americans seem to be very concerned about the facts regarding genetic engineering and other aspects of the biotechnical revolution. They worry significantly about possible risks but heed favorable specific uses of the new knowledge.

These feelings came from a survey released by the Office of Technology Assessment, a nonpartisan group of specialists responsible for helping Congress cope with complex scientific and technological issues. OTA commissioned Louis Harris & Associates to look into public sentiment on emerging biotechnology developments. A wide range of questions were posed to a national sample of 1,273 people.

According to OTA, "The survey finds that while the public expresses concern about genetic engineering in the abstract, it approves nearly every specific environmental or therapeutic application. And, while Americans find the end products of biotechnology attractive, they are sufficiently concerned about potential risks, that a majority believes strict regulation is necessary," either by government agency or some nongovernment group.

Overall, 62% of the respondents expect the benefits of continued scien-

tific and technological innovation to outweigh the possible risks. Just 28% believe the opposite.

A startling large number of the sample considered themselves as knowledgeable or concerned about biotechnology. Yet survey results showed, as OTA suggested, that there was much ambivalence and contradiction.

One fourth of the respondents, for example, said society might be better off if it didn't know how to alter human cells genetically; 42% felt it morally wrong to alter the genetic makeup of human cells, "regardless of the purpose." However, a large proportion, including a large number of those expressing moral doubts, approved gene therapy to cure a usually fatal genetic disease, to reduce the chance of developing one in later life, or to prevent children from inheriting one.

Over half, 52%, said they consider it probable that genetically engineered products "will represent a serious danger to people or the environment." However, the majority, 82%, said they would approve environmental applications of these organisms on a small-scale, experimental basis to bolster agricultural productivity or clean up environmental pollutants.

Moreover, if there were no direct risk to humans and only remote environmental risk, two-thirds of the respondents said they would favor or at least not object if the test was con-

ducted in their own community.

Some other findings of the poll:

- 53% disapproved allowing commercial firms to apply genetically altered organisms on a large scale, even if environmental risks were considered to be very small.

- More than three-fourths of the respondents agreed with the statement that "the potential danger from genetically altered cells and microbes is so great that strict regulations are necessary;" 37% approved regulation by a government agency, 29% by a scientific group. This was despite the fact that university scientists, public health officials and environmental groups were chosen over federal agencies in credibility on biotechnology issues.

The majority of respondents also put more confidence in environmentalist warnings of risk in genetically altered organisms over federal agency assurances of safety in a better than 2-to-1 margin.

Life insurance

The lowest group life benefit companies offer employees is no coverage, say 16% of the firms surveyed by Hewitt Associates. Nine percent offer \$5,000; 20%, \$10,000; 14%, six months' pay; 28%, one year's pay; and, 13% say other.

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Quirk's
MARKETING RESEARCH
Review

Corrections

The following listing was inadvertently omitted from the December/January Focus Group Research Facilities Directory:

The Data Group, Inc.
Meetinghouse Business Center
2260 Butler Pike
Plymouth Meeting, PA 19462
215-834-2080
1, 3, 6, 7B

The telephone number of International Forum Corp., 9900 West Park, Ste. 186, Houston, TX, was listed in the December/January Focus Group Research Facilities Directory incorrectly. The correct number is 713-784-2222.

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area of their organization. These gap scores are then translated into an aggregate score which is compared with the score of a control group used in the research. The result is a fairly accurate assessment of the organization's ethical condition.

Research steps

There were many research steps that went into developing the audit. First, the research team collected stories of organizational integrity. From them, focus groups collected clusters of significant factors contributing to an ethical climate. Next, respondents rated these factors as to their actual and ideal importance.

Collecting "good news" stories about the ethical decisions was the first step. The criteria Wallace and White used in collecting and selecting these stories were as follows: Each was about an actual event; each was told by one or more individuals involved in the organization in which the events occurred; each formed a story with clear descriptions of plot, characters and context about an ethical issue, and all were resolved by at least several individuals within the organizational context. All of these stories represented a variety of organizations and ethical situations from the Minneapolis-St. Paul area.

Identifying factors

Once the stories of organizational integrity were collected, the next step involved identifying the factors which helped the organizations arrive at ethical resolutions. To help with the task, 15 individuals who demonstrate understanding of ethics and leadership from the Minneapolis-St. Paul area were asked to discuss the stories in focus groups. The objective of conducting the two groups was to generate a list of factors which contributed to an ethical climate.



Doug Wallace



Julie Belle White

The list of 40 factors generated form the questions that make up the audit. These questions are categorized into five clusters: Cluster 1 questions center around the ethical principles and values that characterize the organization's environment; cluster 2 questions revolve around the mission and structure of the organization in terms of its readiness to respond to an ethical challenge; cluster 3 questions ask participants to respond to the extent to which leaders and other members of the organization model integrity and responsibility; cluster 4 questions focus on the patterns of communication, and cluster 5 questions deal with problem-solving processes.

The next phase of the research involved sending the audit to 850 people who were in management positions and had been participating in Twin City area leadership programs. The 250 people who responded became the control group.

While Wallace says that this does not represent a random sample of the Twin Cities' population, the group is an excellent sampling of those with demonstrated interest in and the study of issues involved in the survey.

What the researchers found in analyzing the audits was that for all 40 factors, there was a significant gap between what the group felt was needed for their organization to have an ethical climate and what they perceived as actually present.

Some findings

Some of the findings are worth noting. When asked what the respondents desired for their organization's ethical climate in terms of its respect for others' views, the median score attained on this question on the 4-point scale was 3.83. When asked what the group perceived as actually being the case in terms of this factor, the median score was 2.86. With this statement, "Honesty and openness characterizes relationships among affected parties and key players," there was a median score of 3.80 generated in terms of the control group's desire for this to be present in the organization. However, when respondents rated this factor as to their perceptions of it present in their organizations, the median score produced was 2.51.

Wallace says that when factors such as these are wanted by employees in their organizations yet they're perceived as not being there, organizations put themselves at risk.

"Organizations are asking for bad news," warns Wallace, and if something bad does happen because an organization is unbalanced in its ethical positions among employee levels, "most of the time company CEOs are taken by surprise."

Wallace, who has conducted ethics courses for many major Twin City corporations, says plans are currently being negotiated to market the audit to profit as well as non-profit organizations. Media coverage about the audit has already generated many inquiries from companies across the country who want to use it.

In the meantime, Wallace and White want to build a database so that organizations taking the audit can compare themselves with other companies in their same industry, size, years in existence, and by employee gender.

The process of finding out how your organization ranks ethically doesn't stop with the audit, however. Companies that need to improve their ethical climate need to go through many steps themselves to achieve it.

"It's a skill that needs to be developed and involves all employee and management levels," says Wallace. "Having good ethical skills and good management skills go hand-in-hand." MRR

By Beth E. Hoffman
managing editor



Audit helps businesses measure their ethical climate

Most organizations care about having an ethical work climate. That's because an ethical climate usually attracts and retains good people as employees, it promotes high morale, and organizations perceived to be ethical are more likely to attract and sustain good relationships with consumers, clients and other organizations. Nevertheless, ethical problems continuously arise in the workplace. What causes this and what are the implications?

According to Doug Wallace, director of the Center for Ethics, Responsibilities and Values at the College of St. Catherine in St. Paul, Minn., ethical issues come into conflict when upper management perceives reality in a completely different way than do their subordinates, customers, and communities. When that happens, "organizations are asking for trouble.

"When CEOs don't perceive ethical issues as acutely as their employees, that means standards are not being set and workers are left to fend for themselves," explains Wallace. "The result can be serious ethical, if not legal difficulties because if employees aren't clear about the standards,

they'll always opt for the bottom line - what they're being rewarded for."

Unfortunately, research into organizational ethics has found that many persons in upper management are out of touch with their subordinates' perception of reality. A recent survey of Minneapolis-St. Paul executives and managers which measured attitudes toward business ethics illustrates this.

Choosing sides

In the survey, respondents were asked, "In an average business, how often do you think employees might have to choose between doing what their boss tells them... and doing what they feel is right?"

Twelve (4.5%) of the 266 personnel executives and middle managers said such ethical dilemmas arise daily and 48 (18%) said weekly. But of the 25 CEOs who responded, just one thought these questions arise weekly and 20 (78%) thought it happened only once a year.

When queried about how often the business people heard about situations where people had to choose between what the organization expected and what they felt was right, a similar perception gap was found. Among the managers, 60% said they had heard of such situations "often." Yet only one of the CEOs agreed.

Such findings are almost hard to believe, yet they leave one wondering about the ethical climate of one's own organization. Furthermore, should an ethical imbalance exist, is it even possible to turn it around?

Wallace says yes. He and Julie Belle White, director of St. Catherine's Masters of Arts in Organizational Leadership program, have done extensive research that has gone into developing a formal audit which organizations can use to measure its ethical condition and to identify problem areas as well.

What the Organizational Integrity Perception Audit does is ask respondents to consider 40 ethical factors concerning their organization's ethical climate, such as a respect for the views of others or, individuals assuming responsibility for ethical decision-making. They are then asked to rate these factors on a scale from 1-4 (1 being very important and 4 very unimportant) in terms of their importance in two areas: First, how important they actually perceive it to be in their organization, and second, how important they wish it would be.

The difference between the desired and the perceived reality, as Wallace describes it, gives the respondent a "gap score" that shows whether there is a problem in a particular

continued on p. 61

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