Quirk's

MARKETING RESEARCH

Review

Segmentation study determines Greyhound ridership

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Cover
A psychographic segmentation study of its ridership gave Greyhound a clearer picture of its customers. See page 6. Cover photo courtesy of Greyhound Lines, Inc.

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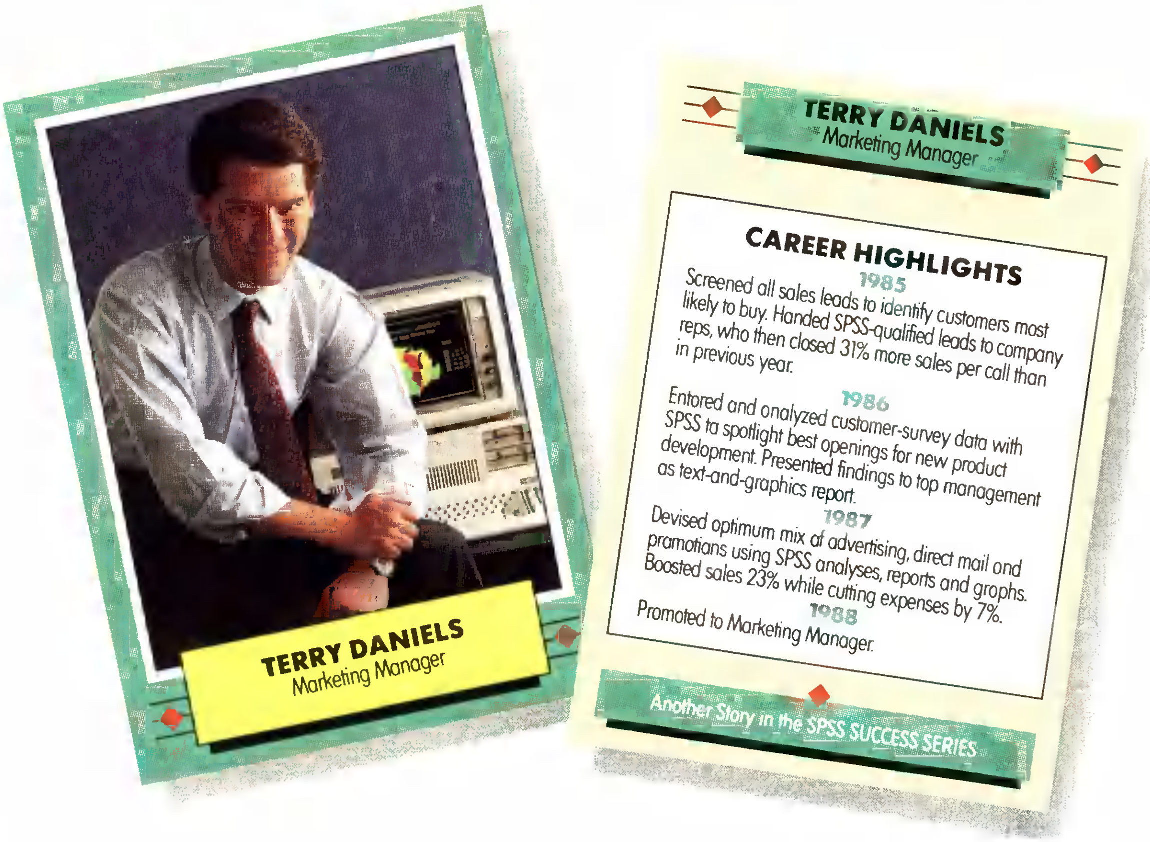

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Segmentation study determines

Though it annually conducts a massive survey of its passengers, Greyhound Lines Inc. decided to learn more about the people who ride its buses. The company's yearly on-board survey, which is distributed for a week in 50 of its biggest markets twice a year, last year netted Greyhound 30,000 responses--providing a clear demographic picture of the Greyhound customer. But, says Gary Graley, the company's director of market research, they wanted more insight into the psychology of the people behind the demographics.

"We wanted to get a dimension of our passenger that went beyond demographics," he says. "We were interested in a psychological profile of our customers. What are their lifestyles? What are their values?"

This is the kind of information that the VALS psychographic segmentation program typically provides, but because prior research had shown that 70% of Greyhound passengers had household incomes below $25,000, Graley says Greyhound felt its passengers wouldn't be accurately described with the VALS system.

"We felt that the VALS types did not fit what a Greyhound passenger was, based on their income and socioeconomic class. We felt that VALS was skewed towards income levels that were probably higher than the normal Greyhound passenger, so we decided to pursue our own psychographic profile specifically for the Greyhound passenger," Graley says.

With the help of Decisions Center, Inc., New York, Greyhound conducted 500 in-terminal personal interviews in 10 major markets (including New York, Los Angeles, Chicago, and Atlanta) averaging roughly 50 interviews per market. In addition, some 400 other interviews were conducted in seven smaller markets (such as San Antonio, Des Moines, Baltimore, and San Diego) to ensure a reliable sample

Greyhound ridership

by Joseph Rydholm
managing editor

among Greyhound's key passenger segments: blacks, Hispanics, college students, senior citizens, military, small town/rural customers and casino visitors.

Interviewers were stationed next to ticket areas and approached ticket buyers to participate in the approximately 45 minute interview. The survey asked Greyhound passengers to provide standard demographic information and to respond to a series of travel- and lifestyle-related statements in an attitudinal section, using a scale of importance of one to five, one indicating the statement "does not describe me or my feelings at all," and five indicating that it "describes me or my feelings completely." The statements dealt with:

- •attitudes towards travel
- •attitudes towards public transportation
- •attitudes towards Greyhound
- •travel behavior
- •personality characteristics
- •self-image
- •values/beliefs
- •lifestyle
- •social behavior
- •media habits

Sample statements in the travel section included "I like to flip through National Geographic and read about other places," "I hate to travel alone." Sample statements from the lifestyle section included "I am bored with my life," "Chess is one of my favorite games," and "I often charge my purchases."

"The travel statements are the statements that were used to produce the actual segments," Graley says. "It was sort of an extension of what VALS would do, which would only look at lifestyle related items. We went beyond that since we were interested in segmenting travelers. We segmented based on the travel items and then described their lifestyle based on the lifestyle section as well as the demographics and the travel habits."

The research segmented Greyhound ridership into five groups.

"We felt that VALS was skewed towards income levels that were probably higher than the normal Greyhound passenger, so we decided to pursue our own psychographic profile specifically for the Greyhound passenger."

Gary Graley

Roost-to-Roost Travelers

This is the largest segment, accounting for 27% of Greyhound ridership. Its members are very home- and family-oriented. They enjoy traveling with family members to visit relatives. They consult travel magazines and brochures when planning their trips. The Roost-to-Roost segment contains the highest concentration of senior citizens. It also has more women, fewer young people (under age 25), many retirees, and more married people. The segment has average income and education levels. They have a positive outlook and are more likely than other passengers to be involved with church and civic matters.

Spontaneous/Impetuous Mixers

21% of Greyhound riders fall into this group, which, as the name suggests, travel primarily for the social experience. They enjoy traveling alone and look forward to meeting and talking to new people. This segment has a high percentage of single young white men. They are less likely to have a job, and their income level is low to average. They are more likely on vacation, not traveling to see friends or relatives, and their plans for the trip were made probably less than two weeks in advance. Their impetuous, "live for the moment" lifestyle is based on a belief that the future will be dull.

Independent Explorers

Independent explorers account for 19% of the ridership. They are very travel-oriented people who travel more to see new and unusual places than to visit friends and relatives. Like the Spontaneous Mixers, they enjoy meeting new people and don't mind traveling alone. They read travel brochures and frequently bring a camera along to capture their trip on film. Members of this segment tend to be white, better educated than those in the other segments (a high percentage of Independent Explorers are college students), and as a whole they have the highest family income. They are non-traditional people who are happy with their lives and optimistic about the future. They are careful with their money but

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Minnesota Mutual charts efficient marketing with MAPS

by Nance Olson

Three decades ago, Minnesota Mutual's group product databases existed primarily for administrative purposes. Financial institutions across the country supplied their customer lists for use in direct mail insurance solicitations. Realizing that these names and addresses could be used beyond an administrative function, the scope of the database was expanded. Today, the database has manifested into a comprehensive marketing vehicle.

The group division currently provides $31.4 billion worth of insurance to more than 1.2 million households nationwide, making it the country's number one provider of mortgage life insurance. Still, the company faces fierce competition and cannot be comfortable with the status quo. In addition, today's discerning customers require increasingly sophisticated marketing methods.

Therefore, having names and addresses isn't enough. It's not who you know, but how much you know about your customer base that counts. Minnesota Mutual has long maintained databases of insureds and applicants, clients and prospective clients, but a database without a marketing direction is not being utilized to its full potential. Minnesota Mutual decided to develop a system to reach that potential.

The company needed to add a marketing bent to the group division's most critical database—potential customers. Nothing less than a radical revolution would allow efficient use of the data. The first step was to find out exactly what the database contained that would help increase direct marketing revenue.

The database provided demographic information, but it did not give a profile of the different buyer types. The "real" customers—their values, attitudes, and perceptions—were elusive.

The company looked to external sources to help round out the customer profile. Two segmentation systems which classify American consumers into homogeneous groups, PRIZM and VALS, were used to complete this analysis.

PRIZM, a geodemographic system designed by Virginia-based Claritas Corp., is built on the sociological principle that people with similar cultural backgrounds, circumstances, and perspectives "cluster" in localities suited to their chosen lifestyles. Using Census data, a two-digit neighborhood lifestyle code is assigned to the smallest geographic areas defined by the Census. A code is subsequently assigned to every level of microgeography, including block groups, Census tracts, postal carrier routes, and ZIP codes. A unique nickname is assigned to each lifestyle cluster to capture the essence of the group and facilitate recall.

The Finer Things

Name:
Clayton (Chip) Chesterfield III

Automobile:
Metallic Blue BMW

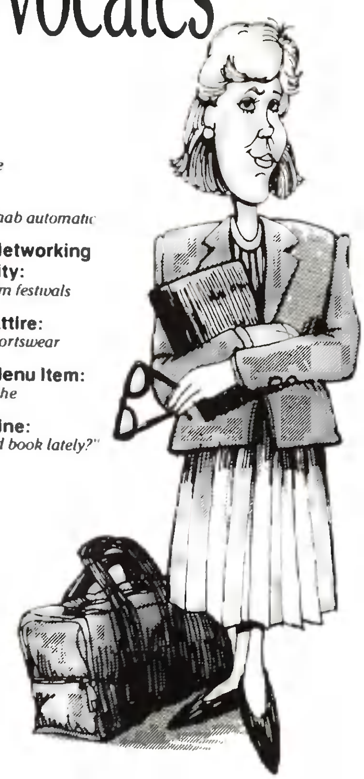
Favorite Social Activity:
Mingling at the country club

Preferred Clothing Ensemble:
Anything with a prominent Ralph Lauren label on it

Choice Delicacy:
Liver pâte'on smart little bits of french bread

Familiar Ouote:
"Charge it to my American Express card."

Advantaged Advocates



Name:
Jennifer Tate

Vehicle:
White 900 Saab automatic

Favorite Networking Opportunity:
Attending film festivals

Favorite Attire:
L.L. Bean Sportswear

Favorite Menu Item:
Spinach quiche

Favorite Line:
"Read a good book lately?"

White Picket Fences

Name:
Betty Reed

Car:
Brown Plymouth Reliant

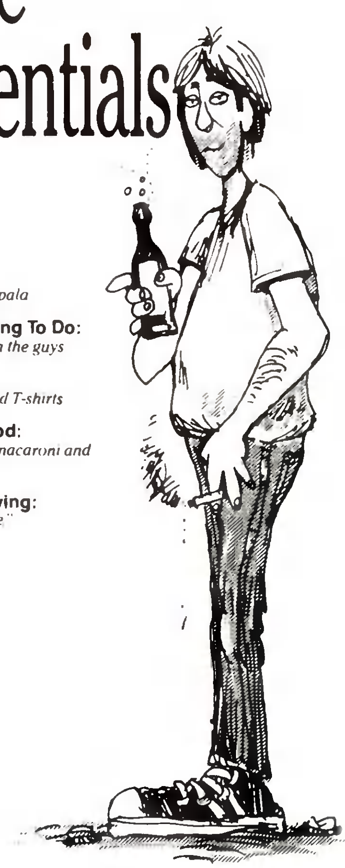
Favorite Weekend Outing:
Attending craft fairs

Favorite Outfit:
JC Penney coordinates

Favorite Food:
Ham and scalloped potatoes

Favorite Phrase:
"When I was your age . . ."

Bare Essentials



Name:
Tom Johnson

Wheels:
1974 Chevy Impala

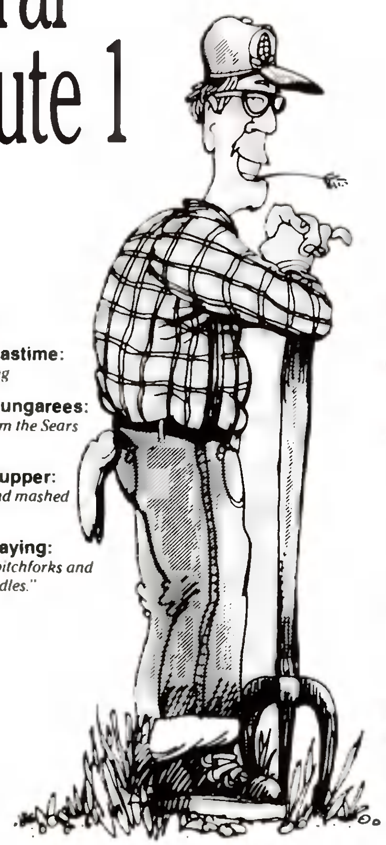
Favorite Thing To Do:
Shoot pool with the guys

Clothes:
Faded jeans and T-shirts

Favorite Food:
Hot dogs with macaroni and cheese

Favorite Saying:
"Well, that's life."

Rural Route 1



Name:
Gus Miller

Truck:
Ford pickup

Favorite Pastime:
Woodworking

Favorite Dungarees:
Coveralls from the Sears catalog

Favorite Supper:
Roast beef and mashed potatoes

Favorite Saying:
"It's raining pitchforks and hammer handles."

VALS—Values, Attitudes, and Lifestyles—was created by Arnold Mitchell of California-based SRI International. Based quite heavily upon Abraham Maslow's *Hierarchy of Needs Growth*, the VALS typology describes consumers by linking their inner values with their outward lifestyle expression. The prime developmental thrust of the typology goes from classifying people as Need-Drive, Inner-Directed, or Outer-Directed. Each of these classifications contains a number of VALS types—for example, Survivors, Achievers, and Experientials.

It would have been nearly impossible to VALS-type all of the 1.2 million insured households, so data was purchased from National Family Opinion (NFO). NFO provided data on 20,000 members of their national panel who had been both PRIZM- and VALS-typed. This data was cross-tabulated to find out the national norm for VALS type within PRIZM cluster. Since this data was projectable to the group division's database, a PRIZM analysis of the database (which required only addresses) predicted the VALS population for the purchasers of the product.

Combining the PRIZM, VALS, and NFO data with the purchasing information already available allowed Minnesota Mutual to create a marketing segmentation system called MAPS—Mortgage Audience Profiling System. MAPS grouped insured and potential insureds into five distinct segments:

The Finer Things

Consisting primarily of families, aged 35 to 44 with upper middle socioeconomic status, they own nice homes, have a lot of discretionary income, and are usually college-educated and career-minded. They tend to be fairly financially sophisticated and skeptical of purchasing insurance through the mail.

Advantaged Advocates

Made up of mostly single professionals with household incomes upwards of $40,000, they believe personal growth comes before getting married and raising a family. They like the convenience of purchasing through the mail, but scrutinize costs and benefits—especially of financial services—carefully.

White Picket Fences

This group enjoys family and home

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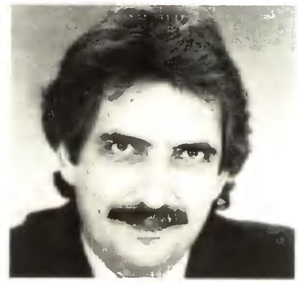
A look at item non-response



by Gary M. Mullet

Gary M. Mullet is a visiting professor in the Management College at Georgia Institute of Technology. His previous marketing research experience includes several years with Sophisticated Data Research and Burke Marketing Research. He has also taught at the University of Michigan and the University of Cincinnati. A reformed theoretical statistician, he is the author of several articles on statistics as applied to marketing research and is an active presenter at meetings of various professional societies.

In the June/July 1988 *Data Use* column, Mike Baumgardner and Ron Tatham discussed how to handle the data from respondents who had no preference in simple paired comparison tests of preference. They wisely stated that they felt "uncomfortable giving a consumer a response that we (made) up." However, not all of their peers in marketing research and data processing agree—a point I'll return to later.

How, then, is one to handle a data set in which a number of questionnaires have item non-response? The problem is somewhat different than that faced above; there, the respondents were explicitly allowed to state that they didn't really prefer one product to another. Here I'm talking about the instances where particular questions are left totally blank or the appropriate "no answer" code is marked. Now what?

Is it a problem? Most assuredly. Anyone who has worked in marketing research for more than five minutes realizes that not all respondents answer all questions. There are several reasons for this. Some of the information is potentially threatening to the respondent, such as income, alcohol usage, age, and the like. Sometimes they have never heard of a particular brand and, thus, can't really rate it on several attributes, even though we ask them nicely to do so. Sometimes they may not know the meaning of one or two of your laundry list of attributes, but will gladly do the ratings for the rest. Motivation aside, it's a small proportion of respondents who answer every question on any given study.

So how are you, the analyst, to do a reasonable data tabulation and statistical analysis of your study, given this missing data (an oxymoron if ever there was one) problem? Unfortunately, there is no universal answer. To say "it depends" sounds like a cop-out, but it truly does depend on your computer hardware, your computer software, how you've coded the "no answer" from the questionnaire and, as always, the objectives of the study. Some of these will be discussed below. However, until some mysterious force compels every respondent to answer every question (honestly, we should add), there seems to be no panacea.

Tabulation and summary statistics

Here's where evidence of the problem may first be seen. Things don't always add up. You know that you have 500 total respondents, but when you add back those who use Brand A most often to those who use Brand B most often, to those who use any other brand most often, you only come up with 493. The rest, of course, didn't answer the question. Run the same data tabulation on someone else's data processing system, however, and the missing respondents may, in fact, magically reappear. What's going on?

Not all computer programs handle missing values the same way. You need to explicitly tell some of them what's going on, others have some built-in assumptions. For instance, one practice is to leave a blank in the card column where there was a "no answer." However, some hardware/software combinations treat that blank as a numeric zero and also count the respondent. Thus, if you are using this type of system, all of your missing values are automatically assumed to be the number zero and you'll have no missing responses at all. But think for a minute what effect this will have on your sample mean ounces consumed per week, or sample median household income category, or even, the proportion of respondents who prefer Brand A, since the new base is total respondents, not just those who made a choice.

Other programs automatically drop a blank from further consideration and, at the same time, make certain that the respondent base size is handled accordingly. Thus, unless you know which you are using, or is being used for you, it's easy to see how two analysts looking at the same data set can come up with completely different sets of crosstabulations and summary statistics.

The other thing you need to be aware of is that in some studies a "no answer" is coded as a "99" or "999," or some other value

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that is far out of range of the usual answer (how'd you like to try to put 99 kids through college?). Whenever you see a sample mean that is far out of line from what you expected, you should suspect that this type of coding might possibly be the cause. Again, unless you explicitly tell the software package that such a code is to be disregarded as missing, it will be counted and added and averaged right along with the rest. Computers, alas, do exactly what we tell them and not what we necessarily want them to do. Clearly, communication with the data tabulation system is a must.

Other statistical problems

Here, too, you need to know your system. Depending on the hardware, there is at least one major heavy duty statistical software system that treats blanks as if they were all numeric zeroes—you lose no responses and, of course, no respondents, if you merely leave a missing value as blank during the data entry stage. At least one other software package treats a blank as a missing value for that particular case only. Another package will discard ALL information from a respondent if they show a blank for only ONE question for some procedures, and won't for others. Does it make a difference? You bet.

A simple example

Assume that you've left all of the "no answers" blank (you know what will happen if you have a 99 or other numeric code punched in, so if you did this, most packages will allow this to be "blanked" by you, explicitly stating missing values as 99). Let's look at the case where respondents are comparing two products on several rating scales and you want to find out for which of these scales the products differ significantly. The first package, above, will put in zeroes wherever it sees a blank and make the comparisons as if every respondent had answered all questions for both products. It's easy to see how this would both deflate the sample means and invalidate the statistical comparisons which you are doing.

The other two packages would both reduce the data base to only those respondents who rated both products on a given scale. Thus, for the first rating scale you might see the 501 respondents who evaluated both products, for the second, the 505 who evaluated both, and so on. For each scale it may be a substantially different set of respondents that are used to make the statistical comparison—this may or may not be worrisome to you. One thing is for sure: you'll end up with fewer pairs of evaluations for each scale than you have total respondents in the study. It shouldn't take much of a stretch of the imagination to see what would happen if the comparisons involved three or four or more products or brands. (For only two such comparisons, we could open the Pandora's box of overlapping samples; but since it seems to be on none of the standard computer software packages, let's not.)

It gets even worse for some of the more complex multivariate procedures. Again, there are packages that will read in the blanks as zeroes and you lose no one at all. Of course, the results are not worth the paper they're printed on. (No problem, either, if you use something like a 99 for no answers and forget to tell the computer. Your results are worth exactly as much as the previous.)

For procedures such as regression analysis and discriminant analysis, the theoretical assumption is that each respondent answered every question currently being analyzed. Many packages drop ALL responses from any respondent who fails to answer even a single question; the respondent becomes a nonentity. It's very disconcerting, but not uncommon, to request a regression analysis using 60 or 70 variables and have the computer print a message that you don't have any respondents. What it means is that none of your respondents have answered all of the questions in the analysis. So, if the blanks are treated as zeroes, you get worthless results; if they cause the respondent to be dropped, you get no results at all.

Discarding all respondent information as in the cases above is called either casewise or listwise deletion. So if you take the same data set and run it through two programs, or if two analysts run the data through any program that causes blanks to trigger listwise deletion, you'll get comparable answers for any of these multivariate procedures, right? Wrong!

Or right, to an extent. They'll give you the same for regression and discriminant analysis. However, let's assume that two analysts are going to do a factor analysis and one of them uses pairwise deletion of missing data and the other uses casewise.

Pairwise means that if a respondent answers, say, 9 out of 10 questions that you're going to factor analyze, her answers can be used to impact 35 out of the 45 correlation coefficients that go into the factoring procedure. The listwise deletion means that all of her answers are discarded and she's essentially treated as if she didn't participate in the survey at all. Now we will probably get factor results which are not at all comparable. Again, you have a need to know how your data are handled.

What can be done? First, you need to know how your analyses will be affected by blanks, 99, or whatever codes you use for missing data. Ask questions and assume nothing. It may mean that you'll have to delve into a computer manual to find the answer or even have to talk to those guys in the basement who dress funny but sure do a great job of keeping the computers going. If you're using an outside source for data processing, be sure to tell them explicitly how you have coded the no answers and how you want them handled.

Second, although I agree with Baumgardner and Tatham about putting words into respondents' mouths, you should recognize that there are a few procedures around for imputation of a numerical value for any missing data. Some software packages recommend that you do so. In fact, one manual goes so far as to state that, "If you have missing values, you will do better taking the time to impute (replace) them in the raw data by examining similar cases or variables with non-missing values." My own thinking on this issue is that if the respondent had wanted to or could have given you an answer, she would have. Imputation is not without risk.

Third, use the amount of item non-response as a positive indicator. If there is a particular statement or set of statements that are causing 90% of the item non-response, then perhaps deleting only those few can straighten out your regression analysis. Of course, always report the number of "no answers" for each question tabulated.

Finally, recognize that for some statistical procedures, "no answer" is an answer. One is correspondence analysis, in which the "no answer" categories can be used in both perceptual mapping and cluster analysis.

As with so much in this life, the key is effective communication between all of the concerned parties—the respondent, the analyst, the project director, the computer, and you. MRR

Investigating respondents' interpretations of survey questions

Editor's note: *The following is an excerpt from a chapter in the U.S. Dept. of Commerce report "Approaches to Developing Questionnaires." Principal contributor: Anitra Rustemeyer Streett.*

One way to evaluate questionnaires is to investigate respondents' understanding of the intent of specific questions and the meaning of their replies to those questions. This technique is called frame-of-reference probing, and is done by asking the respondent some additional questions. It is designed to address concerns about whether the questions, definitions, and instructions proposed for a questionnaire convey the frame of reference desired. Probing to determine respondent frame of reference can be especially useful when words (like "crime") that are key elements in a survey are thought to carry emotional impact.

The probing questions can take different forms: either ad hoc questioning by the interviewer or administration of a set of questions written in advance (called "structured"). Ad hoc questioning usually takes place after the survey questionnaire has been administered. When structured follow-up questions are asked, the probing might be done immediately after the question containing the words or concept of interest is asked; alternatively, it might be done after the survey questionnaire has been completed.

Frame-of-reference probing can be incorporated at various stages of the questionnaire development process. It might be planned as a part of a pilot study or field test or it might be done during the actual survey.

Personnel and skill requirements

This technique is implemented by interviewers, and to some extent, the skill requirements involved depend on whether the probing takes the form of structured follow-up questions or unstructured questioning. In the former case, regular interviewing skills are required; in the latter, more extensive interviewing skills such as detailed probing, the ability to think quickly, and others are also necessary.

When this technique is used during informal testing, it may be preferable for researchers/questionnaire designers to conduct the interviews to give more insight into respondents' interpretations of the word or phrase of interest.

Selection of respondents

The way respondents are selected for frame-of-reference probing depends on which stage in the questionnaire design process the method is used. During the questionnaire development process, respondents are selected using the same purposive selection strategies as those used in informal tests or unstructured interviews. If respondents' interpretations of questions in formal tests or actual surveys are subjected to investigation using this technique, however, respondents have already been selected through scientific

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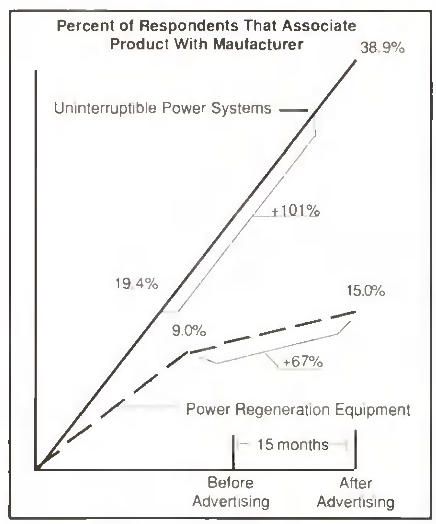
Reports provide data on effectiveness of print advertising

McGraw-Hill Research, through its Laboratory of Advertising Performance (LAP), has developed considerable information on the effectiveness of print advertising. The company designed the LAP to assist business publication advertisers and their agencies in making their advertising more effective, covering a variety of subjects to help solve advertising, selling, and marketing problems. The data for the LAP are culled from a wide variety of sources, a few of which are: advertising readership reports from interviews with thousands of readers of McGraw-Hill magazines; independent studies of industrial marketers and advertisers who cooperate with LAP; and special LAP surveys from confidential data released to McGraw-Hill by manufacturers.

Advertising in husiness puhlications enhances product association with the manufacturer

A concentrated advertising campaign of 24 pages over 15 months in *Electrical Construction and Maintenance* magazine increased product awareness for uninterruptible power systems equipment and power regeneration equipment 101% and



67% respectively. Prior to the ad campaign, there was no advertising for over a year. The charts show advertising's significant impact on two products of a power conditioning equipment manufacturer.

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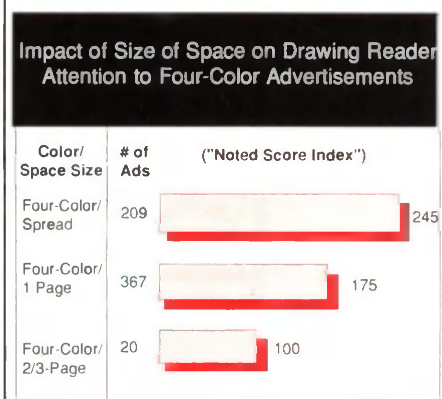
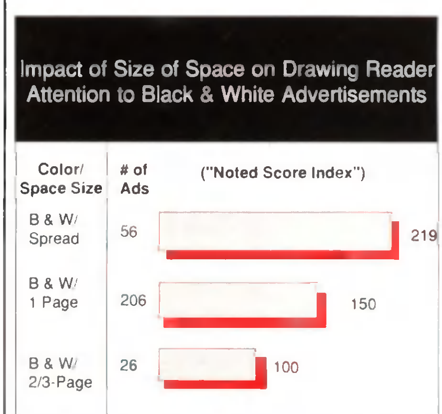
Larger advertisements attract greater reader attention

Larger ads draw greater attention to a four-color or black and white ad, accord-





ing to a 1988 McGraw-Hill Research analysis of 884 ads appearing in the Industrial Technology Edition of *Business Week*. Findings show a consistent rise in Starch "Noted Scores" as size increases. ("Noted" represents the percentage of people interviewed who remembered seeing the advertisement in the issue being

READER SERVICE CARD

FREE INFORMATION ON PRODUCTS AND SERVICES IN THIS ISSUE.

Send me more information on the items circled

390	301	302	303	304	305	306	307	308	309	310	311	312	313	314	315	316	317	318	319
320	321	322	323	324	325	326	327	328	320	330	331	332	338	334	335	386	337	338	389
340	341	342	343	344	345	346	347	348	349	350	351	352	353	354	355	356	357	358	359
360	361	362	383	364	365	366	367	368	369	370	371	372	373	374	375	376	377	378	379
380	381	382	383	384	385	386	387	388	389	390	391	392	393	394	395	396	397	398	399

Name ______________________________ Title ____________________
(Please Print)

Company ____

Address ____

City ________________________ State _______ Zip _______________

Telephone No. ____

Signature ___________________________ Date __________________

PLACE
STAMP
HERE

Quirk's
MARKETING RESEARCH
Review

P.O. Box 23536
Minneapolis, Minnesota 55423

studied.) Specifically, four-color spreads attract more than twice as much attention as four-color, two-thirds page ads.

The two-thirds page noted scores are indexed at 100, one index for black-and-white and the other for four-color. Then, indices are calculated for one page and spread ads for both four-color and black and white.

13 repeat ads continue to draw inquiries with each insertion

The Mineral Panels Division of Manville Corporation ran the same full-page, four-color ad 13 times in *Architectural Record* between July 1986 and October 1987. Five times throughout the campaign, repeated insertions generated more inquiries than the initial insertion in July.

Further, throughout the advertising campaign, the same ad continued to draw inquiries for each repeated insertion. Production costs involved in creating a new ad were saved.

McGraw-Hill Research kept records of inquiries received for each insertion. The number of inquiries generated from the initial insertion was indexed at 100, and indices were calculated for the number of inquiries pulled from each subsequent insertion. (See Fig. 1).

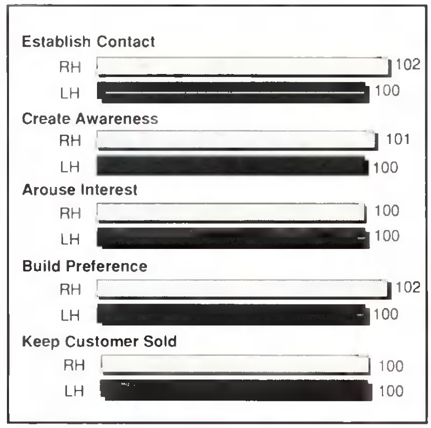
Business-to-business advertisers increase usage of four-color advertising

For three decades, the use of four-color advertising has continued to rise among business-to-business advertisers.

In 1987, the percent of four-color advertising pages in McGraw-Hill publications rose to nearly seven times what it was in 1964. Further, on the average, two-thirds of total ad pages appear in four-color, a substantial increase from 1981. (See Fig. 2).

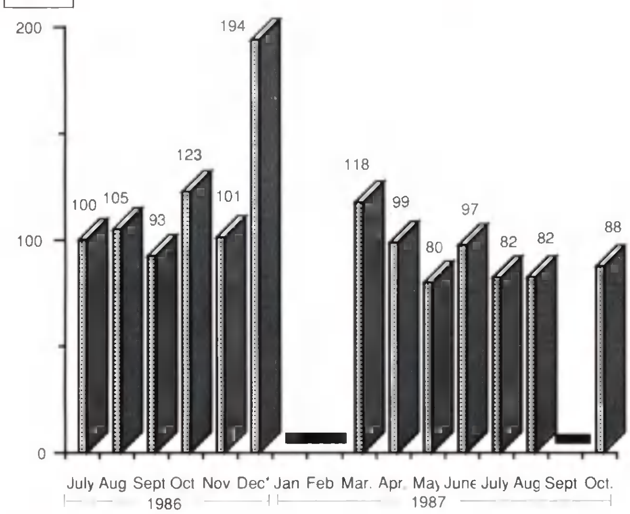
No significant difference in advertising effectiveness between right- and left-hand page ads

Right- and left-hand page ads perform almost equally in achieving specific communications objectives, such as attracting attention, making the prospect



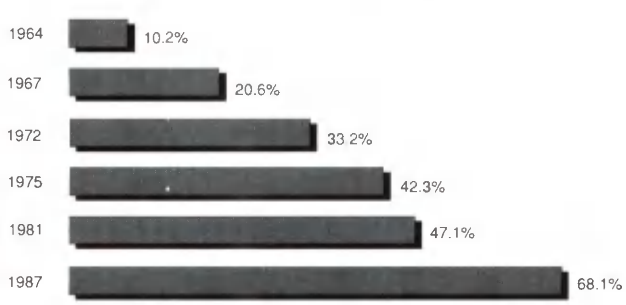
aware of something not known before, causing action by suggesting solutions to

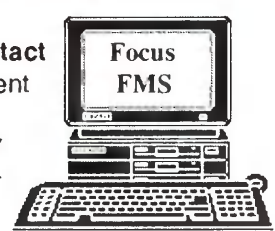
fig. 1 Inquiries Generated From A Repeated Ad In A Monthly Publication



* Annual New Products Issue

fig. 2 Percent of Four-Color Advertising





problems, building preference by intensifying a positive feeling for the company and keeping customers sold.

A computer analysis of 1,394 ads from McGraw-Hill Research's *Electrical Construction and Maintenance* magazine readership database shows only a slight difference in effectiveness between right- and left-hand page advertising.

The charts compare scores for 921 right-hand page ads and 473 left-hand page ads. The left-hand page ads are indexed at 100, and scores for the five advertising objectives are calculated for right-hand pages ads.

"Associated" and "Read Most" scores also increase with larger ads

The advantage of size is shown below utilizing indices of Starch "Noted," "Associated," and "Read Most" scores. ("Noted" represents the percentage of people interviewed who remembered seeing the advertisment in the issue being studied. "Associated" represents the percentage of people interviewed who not only "Noted" the advertisement, but also saw or read part of it which clearly indicated the brand or advertisement. "Read Most" represents the percentage of people interviewed who read half or more of the written material in the ad.)

FOUR COLOR

SIZE	# OF ADS	NOTED	ASSOCIATED	READ MOST
Spread	209	245	269**	220
1 Page	367	175	188	160
2/3 Page	20	100	100	110

BLACK & WHITE

SIZE	# OF ADS	NOTED	ASSOCIATED	READ MOST
Spread	56	219	207	175
1 Page	206	150	143	150
2/3 Page	26	100	100	100

** How to read: Four-Color spreads averaged an "Associated" score of 169% greater than four-color, two-thirds page ads.

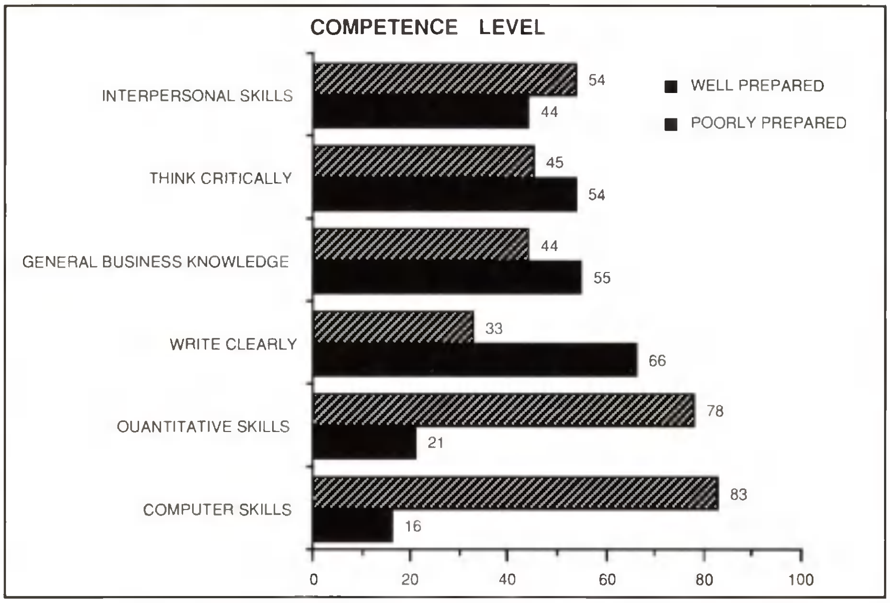
Overall, spreads doubled the scores of two-thirds page ads in each category for both four-color and black and white. Thus, larger ads enhance the amount of exposure and readership of an advertisement.

The two-thirds page scores for "Noted," "Associated," and "Read Most" categories are indexed at 100 for both four-color and black and white ads. Then, indices are calculated for one page and spread ads.

1987 Starch Adnorms were calculated for the *Business Week* Industrial Technology Edition over a two-year study period. The studies were conducted among a representative sample of 150 readers of each issue by personal interviews. Data for each issue were collected the same week as the issue date. Readers were shown an issue page by page and asked whether they had seen or read any part of the advertisement. MRR

Worries, American-style

Few Americans are bothered by getting older, but many are concerned with some of the problems of age, according to a research study by R.H. Bruskin Associates. Nearly half of the people in the United States, 44%, worry about their health. Men and women from every region and from all age, income and education groups fret about health problems. A sixth of the people, 17%, worry about physical impairment. 25% are afraid they don't have enough savings--that their money won't be enough to take them through the course of life. The people most worried about savings are those aged 25 to 34.



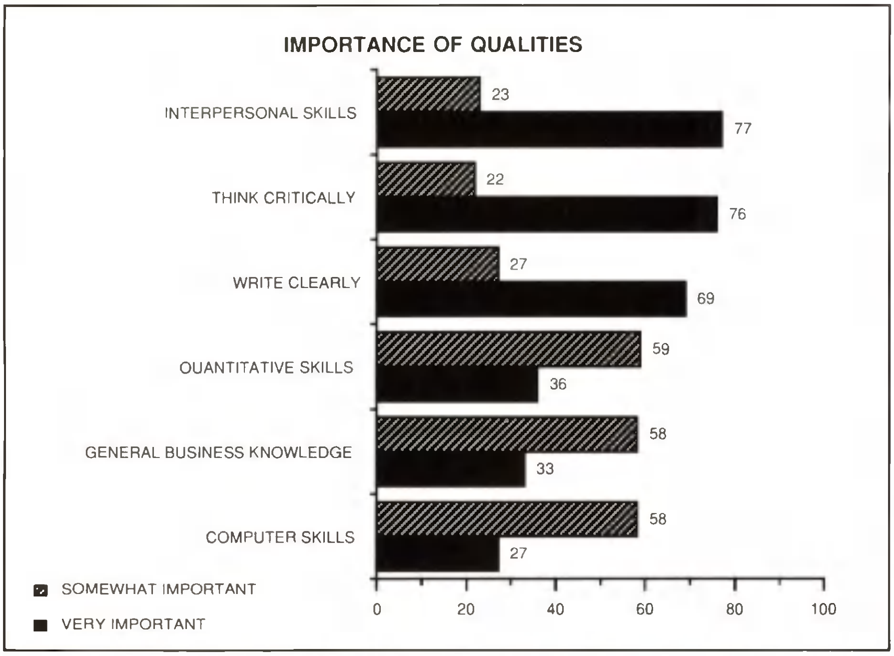
Executives rate newly hired managers

A recent survey conducted by Opinion Research Corp. finds that many of America's top executives find serious deficiencies in the abilities displayed by young managers and professionals in carrying out their jobs. Important skills that executives find lacking among new employees include writing competence and critical reasoning. Executives believe that their younger colleagues are more adept with computers and quantitative data, but these skills are viewed as being less important than others.

Three quarters of executives say that interpersonal skills (77%), and the ability to think critically (76%) are very important to the performance of new managers. In addition, more than two-thirds of executives (69%) stress the importance of writing ability for new managers.

In contrast, only about half as many executives see quantitative ability (36%), general business knowledge (33%), or computer skills (27%) as being of vital importance.

Many of America's business leaders believe that entry-level managers and professionals are ill prepared in certain crucial areas to meet their organization's needs. Forty-four percent believe these new hires are poorly prepared to deal with interpersonal relationships; a bare majority (54%) of executives see newly hired professionals as having adequate interpersonal skills. Executives are even less complimentary about the ability of recent graduates in regard to other quali-



Trade News
continued

tative talents. 54 % say that young managers do not have the ability to think critically. 55% grade new managers as poorly prepared in terms of their general business knowledge. Two-thirds (66%) of executives see junior colleagues as being inadequate writers. This is seen as the most deficient of graduates' skills, with 15% of executives rating them as very poorly prepared.

Although executives see their younger colleagues as being competent in regard to number crunching skills, they are distinctly unenthusiastic in this regard. No more than one executive in five (19%) believe that recent graduates are "very well prepared" in these areas. However, majority proportions find that recent college graduates are at least reasonably well prepared quantitatively; 83% believe this of graduates' ability to use computers, and 78% believe that college graduates are well prepared to work with quantitative data.

A clean car is a happy car

A recent national survey by Maritz AmeriPoll showed that on average 22% of respondents wash their cars weekly. Eighteen percent wash them every two weeks, while another 23% wash their cars once a month. According to the poll, only 5% never wash their cars.

When respondents were asked what car washing method they use most often, nearly half (48%) said they hand wash at home. Interestingly, women were as likely to hand wash at home as men (48% compared to 49% of men). Over one third of the respondents (35%) said they use an automatic car wash, while 14% use a manual car wash facility.

The doctor will see you...soon

About four of every ten adults (41%) in America visited a doctor's office during the month of November, 1988 according to a national study conducted by R.H. Bruskin Associates. Those that did so made an average of over two visits each. The time spent in the waiting room was just about 25 minutes per visit. Plenty of time to catch up on your reading, isn't it?

Who buys new products first?

In a recent OmniTel study, conducted by R.H. Bruskin Associates, some 23% of all adults indicated that when a new product comes on the market, they like to buy it right away. On the other hand, 63% like to wait until others have tried it, with the balance of 14% undecided or not sure about what they would do. However, 28% of all women say they like to buy that new product right away, compared with only 18% of all the men. Another highlight of the findings: adults over 35 years of age and those with incomes of $40,000 or more are more likely to be first in buying new products.

The Hispanic market comes of age

by Arline M. Lowenthal and Daniel M. Press

As many of you already know, the Hispanic population can no longer be taken for granted in terms of marketing considerations. With a population increase of 34% since 1980 (four times that of the general population in that period), the Hispanic segment is primed to make a tremendous impact on the marketing world. Hence, this powerful market demands thorough research—using proper segmentation and taking into consideration varying degrees of subgroup acculturation/assimilation, as well as particular national orientation.

By the year 2010, Hispanics are expected to be America's largest minority. They are literally screaming for attention and cannot be ignored. Approaching the Hispanic community is relatively inexpensive, efficient, and effective. Consider that a 30-second spot on the top-rated Hispanic TV show "Sabado Gigante" costs $11,500, while an equal spot on "The Cosby Show" costs $360,000. Furthermore, when based upon proper research, almost 100% of the targeted audience can be reached for every dollar spent.

A prime reason for the value of the Hispanic market concerns their purchasing tendencies. The Hispanic culture is centered around the family. Thus, as can be expected, Hispanic families spend more on food and packaged and household goods than their general public counterparts. Though the median Hispanic family income is lower than that of the general public ($22,900 vs. $32,000), a greater percentage of their disposable income is spent on household goods. Also, Hispanics generally choose to pay for their purchases with cash.

With proper research, the particular cultural nuances of Hispanics can be utilized as a marketing strategy advantage. Being a "feeling" culture, Hispanics tend to be attracted to campaigns stressing family, community involvement, and personal attention. Special community events are particularly appealing to Hispanics, as was effectively demonstrated during the Cinco de Mayo party at Seaport Village, San Diego, to promote Coors Light Beer. As a result of considering the cultural needs of the Hispanic community, 25,000 people attended the party (*Marketrac San Diego*, March 1989, Vol. 2, No. 3, pp. 17-23).

Findings by Analysis/Research Limited (CHiPS Continuing Hispanic Profile Study, 1982-1988) have revealed that two-thirds of the Hispanic consumers are more likely to buy a product if there is Spanish advertising. However, it must be understood that intention is not enough. Past campaigns have ignored the Hispanic sensitivity concerning proper word usage—such as the infamous Nova (which translates to Spanish as "doesn't go") automobile campaign (*Marketrac San Diego*, op. cit.). The Hispanic market has become too valuable to permit such carelessness.

Other findings from the CHiPS study have identified general attitudes regarding Hispanic consumer behavior. Of greatest concern, the primary store and product selection criteria among Hispanics are price and quality. The Hispanic consumer is influenced by overall store image—being attracted to stores with colorful, inviting decor where they feel comfortable, unthreatened, and respected. After years of feeling like second-class citizens, Hispanics are justly demanding knowledgeable, bilingual, courteous salespeople. Although advertising and promotions have a huge influence on the Hispanic community, they tend to remain brand-loyal consumers.

Effective marketing requires the recognition of various subgroups within the Hispanic community through the proper segmentation in the marketing research. Each subgroup varies with respect to word usage and meaning, cultural traditions, experiences and food. Geographically, each individual sub-group tends to live together, forming several Hispanic microcosms.

Mexicans, the predominant sub-group, comprise 63% of the Hispanic population. Puerto Ricans make up 13%. Cubans, the most economically successful group, constitute 5% and the rest are from Central and South America and the Caribbean.

In the Hispanic community, acculturation is occurring at varying levels and degrees. Various indicators of acculturation (food, language, etc.) seem to gradually float back and forth between primary cultural influence with a gentle but steady motion toward the permanent shifting to Americanization. One factor which tends to decelerate the acculturation process among the Mexican population is the proximity to Mexico. If legal, entry and return is convenient, allowing them to hold on to their family and heritage. Maintaining their language is a firmer commitment by Hispanics than any other ethnic group. More than 70% of Hispanics speak Spanish at home. And 96% want their children to be able to accurately read and write Spanish.

Fig. A

ACCULTURATION VEIL

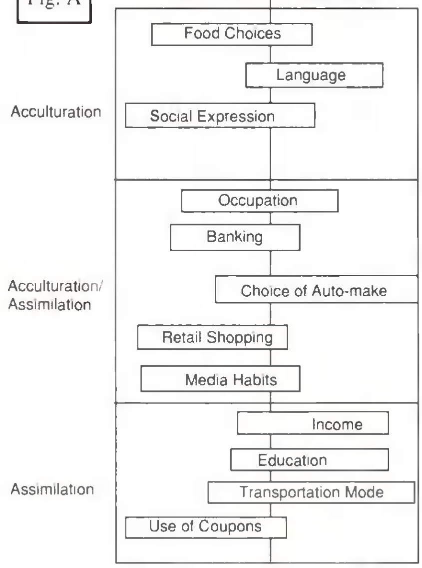


Figure A provides an illustration of the acculturation process. Picture, if you will, a large veil, a permeable membrane. It represents the divider between country of origin and Americanization. The aspects that combine to form the demographics and psychographics of the Hispanics take the form of arrows piercing the veil or membrane at different rates of speed. These represent various characteristics of the population and can be divided into those affecting acculturation, assimilation, and a combination of the two.

Some of the aspects that affect assimilation are: income, education, transportation mode, and use of coupons.

Some of those that tend to affect acculturation are: food choices, language, social expression.

Some that affect both are: occupation, banking, choice of auto/

make, retail shopping, media habits.

Levels of acculturation do not necessarily correlate with income and education levels. For instance, the Cubans are a very successful subgroup with little need for acculturation. Many have come over already educated and wealthy, and maintain their success here while living an easier lifestyle. However, for other less educated and less wealthy immigrants, acculturation greatly increases their acceptance into our society—thus opening opportunities for advancement.

The depth of acculturation does have marketing implications. If slow to acculturate, the Hispanics heavily rely on Hispanic-type products to enjoy their celebrations and traditions to their fullest. Even as acculturation does occur, there is still a desire for products that fulfill traditional needs, as well as products that tie into their embracing of U.S. customs, celebrations and traditions. Thus, a dual marketing potential exists.

For the majority of Hispanics, assimilation occurs much quicker than acculturation. More than just the ability to speak English, the level of acculturation is affected by how comfortable an individual feels interacting with the mainstream. Upon arriving in America, Hispanics tend to adopt the "When in Rome, do as the Romans" credo. Simply, it is easy and enjoyable to adopt certain American advancements over many of the archaic ways of their past. For example, they are glad to "trade in" their walking for driving. The increased income available in the United States is easy to adapt to, and, largely due to curiosity and convenience, American foods find their way into the Hispanic diet. However, there are elements of American culture which Hispanics are hesitant to adopt, including dress, language, celebration of holidays and entertainment.

Although younger generations are beginning to adopt many American habits, older generations remain a large influence. This facet of Hispanic culture tends to inhibit acculturation. An example of the effectiveness of thorough research into Hispanic culture deals with this theme.

In a recent United States Army recruiting campaign, it was discovered that while younger Hispanics watch American television, their parents remain loyal to Spanish TV. With the objective of recruiting Hispanics aged 18-24, the Army advertised on American TV—with poor results. Further research revealed that 61.9% of Hispanic youth seek advice from their parents on such matters (*Fortune*, Nov. 21, 1988, pp. 181-188). By switching their advertising to Spanish TV, the Army increased enlistment considerably. Peace Corps enlistment has increased by 50% among Hispanics due to Spanish commercials.

Now is the time for concerted, carefully segmented marketing research of the Hispanic community. Until now, little Hispanic segmentation has been performed. It is also time to explore psychographic, socioeconomic and demographic factors in terms of varying subculture acculturation levels.

Although Group 1 and Group 3 of the Acculturation Index Group

Fig B

AIG 1-	Total dependence on language of origin
AIG 2-	Bilingual / Bicultural capabilities and attitudes
AIG 3-	Total dependence on English, with varying degrees of heritage carryover

(Figure B) are generally understood, Group 2 needs to be investigated in greater depth, for it is unclear whether members of this bilingual group are more affected by English or Spanish campaigns—or whether it even matters depending on the subject matter.

With the development of special questions by Analysis/Research Limited to determine accurate segmentation of Group 2, as well as increased sensitivity regarding Hispanic subgroup acculturation/assimilation, the Hispanic market is ready to stake its claim in the marketing world.

Arline M. Lowenthal is president of Analysis/Research Limited. Daniel M. Press is an analyst with Analysis/Research Limited.

ISA: interviewing in Spanish and 11 Asian languages

The clients of Interviewing Services of America (ISA) depend on the 80-station, CRT-equipped phone center to provide the quality fieldwork they need. After all, they didn't hire the West Coast's largest telephone data collection and processing center for nothing. They knew ISA could interview people anywhere. They knew ISA had state-of-the-art technology, experienced interviewers and all the field and tab capabilities they'd need. They knew of ISA's commitment to service, strict quality controls, fast turnaround, on-time delivery and competitive prices.

So when several ISA clients realized that Hispanics are the fastest-growing ethnic group in America, and that Asian-Americans have the fastest growing per capita income, they gave ISA a call. They wanted to research the TV viewing habits and fast-food preferences and healthcare experiences of these non-English speaking people. Could ISA help?

"Sure we could," said Michael Halberstam, director of ISA. "Early on, we recognized the need for research in these markets."

To meet this need, ISA's fully-trained, bilingual interviewers and supervisors conduct phone interviews in Spanish and 11 Asian languages: Cantonese, Mandarin, Japanese, Korean, Cambodian, Vietnamese, Thai, Laotian, Indonesian, Malay, and Tagalog. The company also recruits and moderates bilingual focus groups, provides full cultural, conceptual, and idiomatic translations of all questionnaires, and designs samples by nationality. ISA's senior staff is experienced with Hispanic and Asian sampling methodologies, and familiar with the cultural distinctions between specific Hispanic and Asian markets across the U.S.

"This is a specialized field," said Halberstam, "and we've learned all of its 'ins and outs'. We've had to, to provide the first-rate work our clients expect."

Lost...but uow found!

by Lawrence F. Berry

Current research methodologies all leave out segments of the U.S. Hispanic population, adding up to millions of consumers. Why? How can they be reached?

There are three basic methodologies used to collect quantitative data—telephone, personal interview (primarily mall intercept and door-to-door) and mail. Methodology is selected based on study objectives, incidence levels, target audienee, study materials and budgets. Each methodology has known strengths and weaknesses. These are often magnified in the Hispanic market.

Telephone research among Hispanics misses a large segment of the universe—those without telephones, those with unlisted telephone numbers, and those without Hispanic surnames. Depending on who or what you want to believe, a telephone study among Hispanics begins without the ability to reach 30% to 60% of the population. Even if you're an optimist, 30% of the universe is a large segment to automatically write off.

Personal interview, especially door-to-door, is a superior technique for reaching Hispanics. Its primary weakness is that it misses the segment of the population that does not live in Hispanic areas. Also, many clients find it relatively expensive.

Mail panel research is a superior way to screen large samples and find the "hard to reach." It also offers the benefit of being non-intrusive. The big knock on mail research is the time it takes to gather the information. Also, certain studies just don't lend themselves to mail. In the Hispanic market, the traditional mail panels present even greater problems.

Traditional mail panels identify Hispanic households by identifying Hispanic surnames captured in a mass mailing recruiting net. The mailing list is generated primarily from telephone listings, thus missing the 30-60% mentioned previously. In addition to this weakness, the recruiting questionnaire is in English only. There are several studies showing that approximately 50% of U.S. Hispanics are dependent on Spanish to communicate. Therefore, an English questionnaire also misses this other segment of the universe.

Are these important consumers unreachable forever? No! Now a research tool is available that allows the marketing community to reach these segments of Hispanic consumers that are passed over by telephone, door-to-door and traditional mail panels. Venture Marketing Associates has designed and developed HisPañel℠—The Hispanic Mail Panel.

HisPañel℠ is a cost-effective tool for gathering consumer data among a true sample of the U.S. Hispanic population. Panel members were recruited with a bilingual questionnaire and are contacted only in Spanish if that is the language they responded in. HisPañel℠ is balanced for the total U.S. Hispanic population and is available for studies nationally, or by country of origin, or within the major Hispanic geographic areas.

The "lost" can now be found!

Lawrence F. Berry is president of Venture Marketing Associates, Inc., a full service market research company. His more than 20 years of experience includes time as director of market research for a major packaged goods company and time with a mail panel company.

Bilingual Unlimited Research has developed unique research methods

Bilingual Unlimited Research (BUR) is a Hispanic-owned and operated marketing research firm that has developed unique methods to research this rapidly growing segment of the U.S. market. BUR provides services to business and industry, government agencies, educational institutions, community, health eare organizations, and advertising agencies throughout the United States and Latin America.

Founded in 1983, BUR offers specialized marketing services and assists decision makers involved in bringing products or services to the attention of various audiences.

In choosing Bilingual Unlimited Research, you have selected a team of highly qualified Hispanic professionals with individual, first-class talents. Our bilingual staff is fluent and skillful in moving from one language to another. We have a clear understanding of the cultural differences between the various Latino market segments and are completely familiar with the several dialects and expressions that exist. Aware of these differences, Bilingual Unlimited Research creates outstanding Hispanic marketing researeh.

Analysis/Research Limited: broad yet specific

It doesn't happen often. But it does happen. It begins with ideals and a solid commitment, supported by the utilization of the most modern technologies and state-of-the-art equipment available, sprinkled with the right quantity of personalization and held together with an unyielding desire to perform every study more thoroughly than has ever been done.

Quality training and experience evolve into expertise. Customer satisfaction becomes a theme. Clear reports provide accurate information of equal benefit to the small-business "layman" and marketing expert alike. Gently you undergo the transformation into the role of mentor and consultant, due to the constant pursuit of excellence.

Then it hits.

Each client becomes convinced that their subject is your specialty. Through word of mouth, you develop a reputation for having certain specialties—when in fact, what you do is acquire specific knowledge through extensive research on each industry, utilizing special technologies and addressing unique populations.

Through a gradual process, spanning over three decades, one multi-faceted marketing research professional becomes known for having certain specialties in much the same manner. In 1958, Arline M. Lowenthal co-founded Survey Service of Western New York Inc. In 1975, she founded Analysis/Research Limited in San Diego. She is a pioneer in researching the Hispanic market, having done so since 1969.

Analysis/Research Limited is unique in its recognition of excellence and professionalism, in its Hispanic Division as well as all other aspects of the company. This disperses into all areas, from industry specialties to technological specialties to population specialization.

In the area of industry specialties, "Shopping Centers and the Retail Industry" is one of long standing, as is "Travel and Tourism," serving hotels (lodging), cruise lines, airlines, tour providers, and auto rental companies. The legal profession is served by another specialization, including research covering jury selection, mock trial, trademark infringement, as well as other needs of the legal profession including the marketing of its own capabilities. Automotive, entertainment, insurance providers are a few more industries in which Analysis/Research Limited has gained extensive knowledge.

Analysis/Research Limited has honed many technologies and disciplines to deliver more meaningful and easily executed recommendations. An unbeatable melding of the quantitative and qualitative process is acquired through Analysis/Research Limited's Q.Q.P.S. technique. The use of proprietary techniques in ad testing, tracking, and Attitude Awareness Usage studies increase the return on investment into this research.

The enhancement of our Data Collection Division by the opening of a regional mall location, together with the development of the mini focus group process and use of the telephone focus group methodology effectively assists Analysis/Research Limited clients, thus achieving Analysis/Research Limited's goals and fulfilling their mission statement. The extensive background of Analysis/Research Limited in the qualitative discipline, which includes focus groups and one-on-ones, led to the development of their San Diego-based focus group facility as well as the strong national demand for Arline Lowenthal's moderating and consulting capabilities for both her and the Analysis/Research Limited staff of trained moderators.

As for population specialization, thorough knowledge of the general population has give way to comprehensive awareness of both the cultures and languages (dialects) of the Hispanic (over 20 years) and the Asian (over 8 years) communities. Analysis/Research Limited serves all populations, the general population consumer, business-to-business and asso-

ciation segments.

As we have shown, Analysis/Research Limited is worthy of carrying that exclusive classification: "Broad yet specific."

Rife Market Research, Inc. provides bilingnal interviewers

Rife Market Research, Inc. has a staff of bilingual interviewers who are trained not only in telephone interviewing but in tourism and field interviewing as well.

We have 28 WATS lines which can be staffed with Spanish/English interviewers. We recruit Latin focus groups, one-on-ones and have bilingual moderators available.

Located close to the Hialeah area, new corporate offices offer easy accessibility for Latins of all demographics.

Span-Track targets Hispanic markct

Span-Track, the monthly national telephone omnibus exclusively targeted for the Hispanic market, responds to advertisers' increasing need for timely, accurate, projectable and cost-effective marketing intelligence concerning the nation's fastest growing market segment—Hispanics. Each month, Span-Track, developed by Attitude Measurement Corp., Southhampton, Penn., will complete computer assisted telephone interviews (CATI) with a random probability sample of 2,000 Hispanics throughout the U.S.

Span-Track's large sample size and CATI methodology enable Attitude Measurement Corp. to provide computer-generated tables containing national and regional data within one month of completion of the telephone interviewing. The tables also include crossbreaks by other important variables as primary language of respondent, Spanish language media exposure, the household's country of origin, and many other standard demographics.

NAMES OF NOTE

Lydia T. Kihm, formerly account executive at Centrac, Inc.'s headquarters in Bergenfield, NJ, will be in charge of the company's new office in the Washington, D.C. metro area as regional marketing manager.

Stuart Lahn has been promoted to executive vice president of Oxtoby-Smith, Inc., New York, NY.

Jacqueline H. Beckley has joined Chicago-based Peryam & Kroll as vice president. Previously she was group manager for sensory research and evaluation with Quaker Oats Co., Chicago.

Barry Maners has been named director of client services for Walker: Customer Satisfaction Measurements, a division of Indianapolis-based Walker Research. Previously he was with PT Components as director of market planning and development, marketing services division.

Carol Jubert has been promoted to project director at St. Paul, MN-based Rockwood Research.

Bashir A. Datoo has been promoted to senior vice president, director of quantitative research, for Total Research Corp., Princeton, NJ.

Gulovsen

Robert J. Gulovsen has joined Pragmatic Research, Inc. as vice president. Previously he was vice president of marketing for Hollywood Brands, an operating unit of the Sara Lee Corp.

Cheryl L. Bann has been promoted to associate vice president, marketing, at Dain Bosworth, Inc., Minneapolis.

Joe Whelchel has joined the Atlanta office of Elrick & Lavidge as an account manager. Previously he was manager of marketing research and strategic planning for the Red Lobster chain of General Mills Restaurants, Inc. **Joan Gibson** has also joined Elrick & Lavidge as an account manager at the company's San Francisco office. Previously she was associate director of strategic planning for J. Walter Thompson.

Andrew Kulley has been promoted to senior vice president of Response Analysis Corp., Princeton, NJ.

★★★★★

"A sellout performance. Well done!"

B. A., V. P. Research

"One of the best-run sessions I've been to!"

G. C., Creative Director

"Great location. I got there in minutes!"

Harvey V., Accountant, Bala Cynwyd, PA

"A great night in town!"

Marge, Housewife, Trevose, PA

Philadelphia Focus

A Whole New Direction in Focus Groups.

Philadelphia Focus is the surprise hit of the year. It's the only focus group facility in Center City Philadelphia, and with sellout sessions, it's proving that respondents from any demographic segment will come into town to attend your focus group sessions, day or night.

We're convenient. Often, respondents find it easier to hop a train or drive directly into town than wandering all over looking for a location in an unfamiliar suburb. In addition, we're only 20 minutes from the airport, and five minutes from the Amtrak train station, and we offer free parking right next door.

We're experienced. Our staff of seven recruiters guarantee you'll get the respondents you need, or we'll refund the entire cost of your group. Every project is completed on time, even those last-minute rush jobs.

We have everything you need. Our facilities are spacious and modern, featuring the most advanced design and A/V systems. And, naturally, our food is superb, drawing upon the best restaurants in a city known for fine dining.

One visit will convince you. We invite you to call or stop by for more information. Once you've experienced our convenience, experience, and facilities, we're sure you'll give us rave reviews.

Philadelphia Focus

I N C.

100 N. 17th St., Philadelphia, PA 19103 (215) 561-5500

User exchange dates

SPSS Inc. announces its 1989 schedule of dates and cities for its User Exchanges:

Toronto	April 25
Cincinnati	May 23
San Francisco	June 13
Washington, D.C.	September 12

The one-day User Exchanges are designed to update users on SPSS developments, advancements in data analysis procedures, and new products. They also provide users the oppqrtunity to meet others in the data analysis field and to exchange ideas, methods, and approaches. For more information, contact Maryl Wesolowski at 312-329-3506.

Analysis package update

Creative Research Systems is now shipping Version 4.0 of its questionnaire analysis package The Survey System. The new version features an enhanced user interface, including full-screen editing, pop-up menus and a context-sensitive on-line help system. Version 4.0 also includes new table formatting options, new kinds of summary tables, and other new convenience features. The Survey System runs on IBM PC, XT, AT, PS/2 and compatible computers with 384K RAM. Contact Creative Research Systems, 15 Lone Oak Ctr., Petaluma, CA 94952. Telephone 707-765-1001.

New syndicated study tracks physician awareness

DTW Marketing Research Group introduces T.O.M.C.A.T. (Top of Mind Category Awareness Tracking), a twice yearly syndicated tracking study that measures top of mind awareness of products by diagnosis and product category among key physician specialties. For more information contact Gary Troast or Richard Wetzel at 201-325-2888.

Nielsen expands Scantrack

Nielsen Marketing Research announces the SCANTRACK Convenience Store Service, which will report all convenience chain sales activity for a given market. The company recently signed an agreement with The Southland Corporation (7-Eleven Stores), as well as National Convenience Stores (Stop and Go), E-Z Mart, and a number of other convenience cooperators to launch the service. The first market for the service is Dallas, Texas. SCANTRACK will retrieve tactical, weekly sales, price and causal data, allowing manufacturers to measure sales rates per price point, the effect of feature ads, promotional activities, and other marketing programs.

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still enjoy spending it.

Apprehensive Passengers

This segment makes up 17% of Greyhound ridership. The very idea of travel makes them uneasy--they feel like nothing will go right; their bus will be late or their luggage will be lost. Once on the road, they don't enjoy sightseeing or talking to new people. This segment contains an equal percentage of blacks and whites and a slightly higher number of singles. Apprehensive Passengers are generally less educated and their incomes are slightly lower. They don't plan in advance. Their negative outlook on travel extends to their view of the world at large. They are pessimistic about the future and unhappy with their current lot.

Nervous Travelers

Like the Apprehensive Passengers, Nervous Travelers (who form 16% of total ridership) are anxious about travel. They don't enjoy it for any purpose. They are obsessive about keeping to a schedule, and plan their trip well in advance. Nervous Travelers avoid talking to strangers and feel most comfortable traveling with someone they know. They travel primarily to visit friends and relatives. This segment contains the highest proportion of women, fewer singles and an equal number of married and divorced people. As a whole, the segment is of average age, occupation, education and household income level. They are stable people who view life seriously and prefer staying at home to traveling.

Many uses

So far, the research findings have been put to many uses. A TV spot portraying some of the segments was shown last year on a limited basis, but such direct use of the segments for ad content is the exception rather than the rule. Instead, Graley says, the research will be used to inform Greyhound advertising, much of which is produced for network radio.

"We're not going to directly design something around it, but at the same time, the information that was generated in that research project—as well as all of our other research—certainly is being utilized both in designing the spot and where we air it," he says.

Training program

The segments will be also be used as part of a training program for employees who have or will have a great deal of contact with the customers.

For example, the psychographic profiles will give the approximately 800 employees of Greyhound's two regional Telephone Information Centers (which disperse fare and schedule information for all of Greyhound's major U.S. markets) a better idea of the personalities and lifestyles of the people on the other end of the telephone line. A similar concept will be also be used in new driver training programs.

Economically viable

Last year Graley delivered a paper based on the segmentation study before the U.S. Travel Data Center's Travel Outlook Forum, in an effort to inform the conference about a less affluent, but economically viable group of traveling consumers.

The paper communicated to the forum attendees that there is a large group of travelers in the United States that are in many ways different from travelers using other modes of transportation. They are less likely to be on vacation and far less likely to be traveling on business. They are more likely visiting friends or relatives and view their trip as a necessity. For many of them, other modes of travel may not be affordable. 50% of all Greyhound passengers report that they do not have access to a reliable car, so even automobile travel may not be a viable transportation alternative.

Target market

Graley also sees the segmentation study being used in tandem with Greyhound's geodemographic research.

"In approximately 50 markets we have developed geodemographic profiles of our customers by capturing their home ZIP codes. Utilizing National Decision System's Infomark package, detailed demographic information is developed for our customers on a ZIP code level. We have used this information primarily for terminal relocation and site selection, however it also has applications in target marketing.

"Since a demographic profile of each of the five psychographic segments is available, it is also possible to determine the psychographic profile of a specific geographic area utilizing results from geodemographic analysis." MRR

DecisionsCenter, Inc. is a New York-based division of Research International, providing custom research.

PLACE
STAMP
HERE

Quirk's
MARKETING RESEARCH
Review

P.O. Box 23536
Minneapolis, Minnesota 55423

Centrac Inc. has opened a regional marketing and sales office in the Washington, D.C. area. The new office's address is 9158 Rothbury Drive, Suite 105, Gaithersburg, MD 20879. Telephone 301-948-4531.

Oxtoby-Smith Inc. has moved to new, larger quarters at 215 Park Ave. South, New York, NY, 10003. Telephone 212-614-0040.

◆

The Wagner Group, Inc., a full-service firm conducting qualitative and quantitative research, has been formed. Offices are located at 53 West 21st St., New York, NY 10010. Telephone 212-627-0066.

◆

Savitz Research Center, Inc. has opened new corporate headquarters at Monfort Park, 13747 Montfort Dr., Suite 111, Dallas, TX, 75240. Telephone 214-386-4050.

◆

As of April 15th, the Columbus office of **T.I.M.E. Market Research** will change its name to **Focus and Phones of Columbus**.

◆

Merrill Moss and Larry Noedel announce the formation of **Rainier Research**, a marketing research firm located at 5129 Eagle Harbor Drive, Seattle, WA 98110. Telephone 206-842-4797.

Moss

Noedel

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.

ADI Research, Inc.
8044 Montgomery Rd., Suite 625
Cincinnati, OH 45236
513/984-2470
Contact: Michael L. Dean, Ph.D.
Cincinnati's most modern and convenient facilities.

Alpha Research Associates, Inc.
P.O. Box 28497, North Station
Providence, RI 02908
401/521-6660
Contact: Victor L. Profughi
FullSvcQual/Quan.Analysis./Consltg&MktRes/Since 1976

American Public Opinion Survey & Market Research Corp.
1324 South Minnesota Ave.
Sioux Falls, SD 57105
605/338-3918
Contact: Warren R. Johnson
Established 1960—Full Service Group—National & Internat'l

Analysis Research Limited
4655 Ruffner St., Ste. 180
San Diego, CA 92111
619/268-4800
Contact: Arline M. Lowenthal
All Qual.Needs:Eng.&Span. Recruit/Moderate/Analysis

The Answer Group
11161 Kenwood Rd.
Cincinnati, OH 45242
513/489-9000
Contact: Maribeth McGraw
Consumer,HealthCare,Prof., Focus Groups,One-On-Ones

Arbor, Inc.
3401 Market St.
Philadelphia, PA 19104
215/387-5300
Contact:Kathy Hammersla, Ph.D.
25 Years Service in Industry. Qual/ Quant Ad Hoc Research.

Bilingual Unlimited Research
P.O. Box 20923
San Diego, CA 92120
619/583-6243
Contact: Luz Pereira
Spec. In Hispanic Qual. Rsch. National/International

Brand Consulting Group
17117 W.Nine Mile Rd./Ste. 1020
Southfield, MI 48075
313/559-2100
Contact: Milton Brand
Consumer,Advertising Strategy, New Product Strategy Research

Burke Marketing Research, Inc.
800 Broadway
Cincinnati, OH 45202
513/852-3789
Contact: Norman Ussher
Natl Network of Moderators:Hi-Tech/Finance/Child/Older Adult

Consumer/Industrial Rsch Svce
600 North Jackson St.
Media, PA 19063
215/565-6222
Contact: James D. Lewis
Health Care;Agri-Bus;Ind; Trad'l;Tele;One-On-One

Consumer Opinion Services
12825-1st Ave. South
Seattle, WA 98168
206/241-6050
Contact: Jerry Carter
Consumer,Business Groups and One-On-Ones

Creative Marketing Solutions, Inc.
P.O. Box 568
Langhorne, PA 19047
215/357-3655
Contact: Larry Schwarz
Experienced Specialists in Qualitative Research Techniques

Creative Research Associates,Inc.
500 N. Michigan Ave.
Chicago, IL 60611
312/ 346-9160
Contact: Stephen Turner
Twenty-Five Years of Leadership in Qualitative Research

The Datafax Company
2600 Maitland Ctr. Pkwy/Ste. 170
Maitland, FL 32751
305/660-8878
Contact: Nancy McAleer
Consumers,Physicians,Tourists, Executives,Ads,13 Yrs. Exp.

The Data Group/IRI
2260 Butler Pike
Plymouth Meeting, PA 19462
215/834-2080
Contact: Maria Krieger, Ph.D.
Expertise In Qual. Res. Design, Implementation & Analysis

Datatactics, Inc.
555 Presidential Blvd.
Bala Cynwyd, PA 19004
215/668-1660
Contact: Phyllis Rosenberg
Prof & Cons Segments, incl. Doctors. Applied Psych. Meth.

Decision Research
33 Hayden Ave.
Lexington, MA 02173
617/861-7350
Contact: Peg Marrkand
One-way Mirror Conf. Rm. Sty. Obser.Rm.15X17(15-20 viewers)

DeNicola Research, Inc.
325 Greenwich Ave.
Greenwich, CT 06830
203/629-3323
Contact: Nino DeNicola
Consumer,Healthcare,Financial Services, Advertising

Dolobowsky Qual. Svcs., Inc.
94 Lincoln St.
Waltham MA 02154
617/647-0872
Contacts: Reva Dolobowsky
Experts In Idea Generating Groups,In-Depth Interviews

Doyle Research Associates,Inc.
919 N. Michigan/Ste. 3208
Chicago, IL 60611
312/944-4848
Contact: Kathleen M. Doyle
Specialty:Children/Teenagers Concept&Product Evaluations

DTW Marketing Research Group
395 Pleasant Valley Way
West Orange, NJ 07052
201/325-2888
Contact: Richard Wetzel
Healthcare:MD,RN,RPh,Pts,Hosp; Full Service Quan/Qual, Facility

Elrick and Lavidge, Inc.
10 S. Riverside Plaza, #1730
Chicago, IL 60606
312/726-0666
Contact: Melanie S. Payne
Have Senior Moderators in CHGO / ATL / SF / St. Louis

Faber Marketing Research
222 So. Elm St.
Greensboro, NC 27401
800/334-0867/NC-919/378-1181
Contact: J. Albert Faber
Industrial/Consumer/Bus-To-Bus /New Prod;24 Yrs Exper

Far West Research, Inc.
1315 23rd Avenue
San Francisco, CA 94122
415/564-8923
Contact: Cliff Levy
Product/Pkging Advg & Social. Concepts / 30 Yrs. Prof. Exp.

Fedder Research
1560 N. Sandburg, #3708
Chicago, IL 60610
312/ 440-0510
Contact: Curt Fedder
Male Moderator/Client Marketing Background/Expert Analysis

Findings International Corp.
1641 S.W. 87th Avenue
Miami, FL 33165
305/ 266-9798
Contact: Orlando Esquivel
Bi-Lingual/Cultural Serving Major Markets with Ofcs inPuerto Rico.

First Market Research Corp.
121 Beach St.
Boston,MA 02111
617/482-9080
Contact: James R. Heiman
High Tech,Publishing, Bus-To-Bus, Colleges

First Market Research Corp.
121 Beach St.
Boston, MA 02111
617/482-9080
Contact: Linda M. Lynch
Consumer,Retail,Banking, Health Care

First Market Research Corp.
121 Beach St.
Boston, MA 02111
617/482-9080
Contact: Jack M. Reynolds
Banking,Health Care,Ad Testing,Consumer,Executive

Fitzpatrick Research Services, Inc.
102 Foxwood Rd.
West Nyack, NY 10994
914/353-4470
Contact: Linda Fitzpatrick
Expert Moderator, Strong Marketing Background

Focused Research
8247 Valley Dr.
Chagrin Falls, OH 44022
216/543-9340
Contact: Susan Ray Stone
13 Yrs. Exp., Advertising, P.R. Consumer, High-Tech.

D.S. Fraley & Associates
1205 East Madison Park
Chicago, IL 60615
312/536-2670
Contact: Diane S. Fraley
Full Qual. Specialty:Child/Teen / In-Home/Observational Rsch

Greenfield Consulting Group,Inc.
1560 Broadway
New York, NY 10036
212/730-1890
Contact: Andrew Greenfield
Qual./Quan. Rsch, New Product Dev., Finc Svcs,Toys/Games.

Gross Marketing Research
10711 Baile Ave.
Chatsworth, CA 91311
818/831-1905
Contact: Ronald P. Gross
24 Yrs Exp/Creative/Insightful Fresh/Practical/Clear Results

Hammer Marketing Resources
12 Maymont Court
Timonium, MD 21093
301/252-5757
Contact: William L. Hammer
New Product,Consumer & Industrial/Commercial,Executive

Hispanic Marketing Communication Research
2438 Hopkins Ave.
Redwood City, CA 94062
415/361-8124
Conact: Dr. Filipe Korzenny
Hisp. Focus Grps In U.S., Abroad Biling./Bicult.Qual./Quan.Rsch.

D.S. Howard Assoc., Inc.
307 No. Michigan Ave. #1214
Chicago, IL 60601
312/372-7048
Contact: Dennis S. Howard, Ph.D.
Expert Guidance In Design, Implementation And Analysis

InfoDirect, Inc.
230 South Broad St.
Philadelphia, PA 19102
215/735-7416
Contact: Jonathan Brill
Financial Services, Consumer, Healthcare, Geriatric, Hi-Tech

Intersearch Corporation
132 Welsh Rd.
Horsham, PA 19044
215/657-6400
Contact: Robert S. Cosgrove
Medical, Industrial, Business, Consumer, Bio-Tech, Commun.

Kennedy Research Inc.
405A Waters Bldg.
Grand Rapids, MI 49503
616/458-1461
Contact: Mary P. Tonneberger
Cons. & Ind., Telecom., Health, Office Systems, Chemicals, Drugs

Langer Associates, Inc.
19 W. 44th St., Ste. 1601
New York, NY 10036
212/391-0350
Contact: Judith Langer
Spec. In Qual. Rsch. On Mktg. & Lifestyle Issues

LaScola Qualitative Research
3701 Connecticut Ave., N.W.
Washington D.C. 20008
202/363-9367
Contact: Linda J. LaScola
Public Affairs, Healthcare, Telecommunications, Financial

Marketeam Associates
555 No. New Ballas Rd.
St. Louis, MO 63141
Contact: Richard Homans
Financial Services, HealthCare, Consumer, Pkgd Goods, Agric

Market Research Institute
7315 Frontage Rd./Ste. 200
Merriam, KS 66204
913/236-6060
Contact: Trish Benskin
Grtr Kansas City; Full Svce; Exp: Cons/Fin/Ind/Health Care

Market Views Research, Inc.
1215 Hightower Trail, D-150
Dunwoody, GA 30350
404/992-1289
Contact: Dan Brown
Advertising, Decision Makers Marketing Quality Circles

Martin Research Inc.
P.O. Box 8595
Roanoke, VA 24014
703/342-1970
Contact: Frank Martin, III
Focus group facilities in Norfolk, Roanoke, Winston-Salem

MedProbe Medical Mktg. Rsch
7825 Washington Ave. S., Ste 745
Minneapolis, MN 55435
612/941-7965
Contact: Asta Gersovitz, Phrm.D.
MedProbe Provides Full Service Custom Market Research

Menendez International
7951 S.W. 40th St./Ste. 208
Miami, FL 33155
305/266-0550
Contact: Teresa Menendez
Hispanic/Gen Market-15 Years Qualitative/Quantative Exp.

Mercadotecnia Consulting Div. of The Creative Group
31800 Northwestern Hwy.
Farmington Hills, MI 48018
313/855-7813
Contact: Claudia Ruiz-Shipe
Hispanic/Black Interviews, Grps, Surveys, Panels, Placements

Moosbrugger Marketing Research
901 W. Hillgrove Ave.
LaGrange, IL 60525
312/354-5090
Contact: Mary C. Moosbrugger
Expertise in Healthcare, Food, Agriculture, Banking

Murray Hill Center
205 Lexington Ave.
New York, NY 10016
212/889-4777
Contact: Susan Mender
3 Rm Full Svce Facility; Efficient, Beautiful, Competitive Price

New South Research
700 South 28th St./Ste. 106
Birmingham, AL 35223
205/322-9988
Contact: Louis Wilhite
Healthcare, Financial, Media Focus Groups, Mystery Shops

PlayLab Research, Division of The Creative Group, Inc.
31800 Northwestern Hwy.
Farmington Hills, MI 48018
313/855-7812
Contact: Dana Blackwell
Children, Youths, Teenagers Students, Parents & Teachers

Research Arts, Inc.
1300 Iroquois/Ste. 100
Naperville, IL 60540
312/420-2064
Contact: Francesca Jaskowiak
Qualitative Firm, 5 Moderators on Staff. Qwn Facility

Research Incorporated
521 Plymouth Road/Ste. 115
Plymouth Meeting, PA 19462
800/828-3228
Contact: Harley Mitchell
Cons; Bus-To-Bus; Ind; New Prod/ Svces; Concepts/Pkg Des. Tests

Rockwood Research Corp.
1751 W. County Rd. B
St. Paul, MN 55113
612/631-1977
Contact: Dale Longfellow
High Tech, Executives, Bus.-To-Bus., Ag, Specifying Engineers

Southeastern Institute of Research, Inc.
2325 West Broad St.
Richmond, VA 23220
804/358-8981
Contact: Rebecca H. Day
Est. 1964, Full Service Qualitative and Quantitative

Schrader Rsch. & Rating Svce.
South River Rd.
Cranbury, NJ 08512
609/395-1200 or 800/257-9440
Contact: Jack Paxton
Pkg Goods/Retailing/Travel/ Entertainment Reg/Exec. Grps.

SMS Research & Marketing Services, Inc.
1042 Fort Street Mall/Ste. 200
Honolulu, HI 96813
808/537-3356
Contact: Sheila M. Sanders
Since 1960, Full Service, Bus., Tourists, Intercept, One-On-One.

James Spanier Associates
120 East 75th St.
New York, NY 10021
212/472-3766
Contact: Julie Horner
Focus Groups And One-On-Ones In Broad Range Of Categories

Strategic Marketing Services
P.O. Box 505
Portland, ME 04112
207/774-6738
Contact: Robert W. Cuzner
20 Yrs Broad Based Exper. Nationwide. Full Service

Taylor Research
3990 Old Town Ave., #201A
San Diego, CA 92110
619/299-6368
Contact: Beth Ilas
30 Yrs Exp; Cons. & Ind: Commodious Faclties/Attn To Security

Thorne Creative Research Services
10 Columbia Place
Mt. Vernon, NY 10552
914/699-7199
Contact: Gina Thorne
Ideation, Teens, New Product, Ad Concepts, Package Goods

TrendFacts Research, Division of The Creative Group, Inc.
31800 Northwestern Hwy.
Farmington Hills, MI 48018
313/855-7810
Contact: Dr. Jim Leiman
Hi-Tech, Industrail, Financial Health Care, Consumer, Retail

Total Research Corporation
5 Independence Way
Princeton, NJ 08540
609/921-8100
Contact: Hugh J. Devine, Jr.
10 Moderators; 2 State of Art Facilities In Princeton/Tampa

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

Wade West, Inc.
5430 Van Nuys Blvd./#102
Van Nuys, CA 91401
213/872-1717
Contact: Louise Kroot-Haukka
Consumer/Pkg Gds/Advertising Heavy Exp In Fast Food

Paul A. Warner Associates, Inc.
3355 Lenox Road, NE Suite 665
Atlanta, GA 30326
404/239-0101
Contact: Robin S. Salter
25 Years of Experience in Design, Moderation & Analysis

Lucy Warren & Associates
3619 29th Street
San Diego, CA 92104
619/295-0342
Contact: Lucy Warren
Understands / Meets Business Needs With Quality / Experience

The Winters Group, Inc.
14 Franklin St.
Rochester, NY 14604
716/546-7480
Contact: Susan Morrison-Vega
InfoThatWorks. Svces Incl Pri/Sec Rsch, Cnsltg, TeleMktg

Wolf/Altshul/Callahan, Inc.
171 Madison Ave.
New York, NY 10016
212/725-8840
Contact: Ed Wolf
All Consumer/Business-To-Business Qualitative Needs

Youth Research/CSi
Brookfield Commons B-22
246 Federal Rd.
Brookfield, CT 06804
203/797-0666
Contact: Karen Forcade
ConsultantsInMktgToChildren FullSvcQualitative/Quantitative

STATE CROSS INDEX OF MODERATORS

Refer to Above Listings For Address, Phone Number and Contact

Alabama
New South Research

California
Analysis Research Ltd.
Bilingual Unlimited Research
Far West Research, inc.
Gross Marketing Research
Hispanic Marketing
Taylor Research
Trotta Associates
Wade West, Inc.
Lucy Warren & Associates

Connecticut
DeNicola Research, Inc.
Youth Research/CSi

Washington D.C.
LaScola Qualitative Research
Martin Research Inc.

Florida
The Datafax Company
Findings International Corp.
Menendez International

Georgia
Market Views Research, Inc.
Paul A. Warner Associates, Inc.

Hawaii
SMS Research & Marketing Svce

Illinois
Creative Research Associates
Doyle Research Associates
Elrick and Lavidge, Inc.
Fedder Research
D.S. Fraley & Associates
D.S. Howard Assoc., Inc.
Moosbrugger Marketing Rsch.
Research Arts, Inc.

Kansas
Market Research Institute

Maine
Strategic Marketing Services

Maryland
Hammer Marketing Resources

Massachusetts
Decision Research
Dolobowsky Qual. Svcs., Inc.
First Market Rsch(J. Heiman)
First Market Rsch(L. Lynch)
First Market Rsch(J. Reynolds)

Michigan
Brand Consulting Group
Kennedy Research Inc.
Mercadotecnia Consulting
PlayLab Research
TrendFacts Research

Minnesota
MedProbe Medical Mktg. Rsch
Rockwood Research Corp.

Missouri
Marketeam Associates

New Jersey
DTW Marketing Research Group
Schrader Rsch & Rating Svce
Total Research Corporation

New York
Fitzpatrick Research Services,Inc.
Greenfield Consulting Group,Inc.
Langer Associates, Inc.
Murray Hill Center
James Spanier Associates
Thorne Creative Research Svcs
The Winters Group
Wolf.Altshul/Callahan, Inc.
Consumer/Industrial Rsch Svce
Creative Marketing Solutions
The Data Group
Datatactics, Inc.
InfoDirect, Inc.
Intersearch Corporation
Research Incorporated

North Carolina
Faber Marketing Research
Martin Research Inc.

Ohio
ADI Research, Inc.
The Answer Group
Burke Marketing Research,Inc.
Focused Research

Pennsylvania
Arbor, Inc.

Rhode Island
Alpha Research Associates, Inc.

South Dakota
American Public Opinion Survey & Market Research Corp

Virginia
Martin Research Inc.
Southeastern Inst. of Rsch.

Washington
Consumer Opinion Services

SPECIALTY CROSS INDEX OF MODERATORS

Refer to Above Listings For Address, Phone Number and Contact

ADVERTISING
Analysis Research Ltd.
Bilingual Unlimited Research
Brand Consulting Group
The Datafax Company
DeNicola Research, Inc.
Dolobowsky Qual. Svcs., Inc.
Doyle Research Associates
D.S. Fraley & Associates
First Market Rsch(J. Reynolds)
Market Views Research, Inc.
Menendez International
Mercadotecnia Consulting
Research Arts, Inc.
Research Incorporated
Rockwood Research Corp.
Schrader Rsch & Rating Svce
James Spanier Associates
Thorne Creative Research Svcs
Total Research Corporation
Paul A. Warner Associates, Inc.

AGRICULTURE
Consumer/Industrial Rsch Svce
Moosbrugger Marketing Rsch.
Rockwood Research Corp.

APPAREL
Brand Consulting Group
PlayLab Research

AUTOMOTIVE
ADI Research, Inc.
Schrader Rsch & Rating Svce
TrendFacts Research
Paul A. Warner Associates, Inc.

BIO-TECH
D.S. Howard Assoc., Inc.
MedProbe Medical Mktg. Rsch
The Winters Group

BLACK
Mercadotecnia Consulting
Paul A. Warner Associates, Inc.

BUSINESS-TO-BUSINESS
Consumer Opinion Services
Elrick and Lavidge, Inc.
Faber Marketing Research
Fedder Research
First Market Rsch(J.Heiman)
D.S. Howard Assoc., Inc.
Intersearch Corporation
Kennedy Research Inc.
Market Views Research, Inc.
Moosbrugger Marketing Rsch.
Research Incorporated
Rockwood Research Corp.
Southeastern Institute of Research, Inc.
Strategic Marketing Services
TrendFacts Research
Total Research Corporation
Trotta Associates

CANDIES
D.S. Fraley & Associates
PlayLab Research
Research Incorporated
Youth Research/CSi

CHILDREN
ADI Research, Inc.
Burke Marketing Research, Inc.
Doyle Research Associates
Fedder Research
D.S. Fraley & Associates
PlayLab Research
Research Incorporated
Youth Research/CSi

CIGARETTES
Paul A. Warner Associates, Inc.

COMMUNICATIONS RESEARCH
D.S. Fraley & Associates
PlayLab Research
Research Incorporated
James Spanier Associates
Youth Research/CSi

COMPUTERS/MIS
First Market Rsch(J. Heiman)
D.S. Howard Assoc., Inc.
Research Incorporated
Total Research Corporation

CONSUMERS
Consumer/Industrial Rsch Svce
Consumer Opinion Services
DeNicola Research, Inc.
Doyle Research Associates
Faber Marketing Research
First Market Rsch(L. Lynch)
First Market Rsch(J. Reynolds)
D.S. Howard Assoc., Inc.
Kennedy Research Inc.
Langer Associates, Inc.
Mercadotecnia Consulting
Research Incorporated
SMS Research & Marketing Svce
Southeastern Institute of Research, Inc.
Taylor Research
Thorne Creative Research Svcs
Trotta Associates

ENTERTAINMENT
D.S. Fraley & Associates
Langer Associates, Inc.
Research Incorporated
Total Research Corporation

EXECUTIVES
Decision Research
Dolobowsky Qual. Svcs., Inc.
Elrick and Lavidge, Inc.
Fedder Research
First Market Rsch(J. Heiman)
First Market Rsch(J. Reynolds)
Kennedy Research Inc.
Market Views Research, Inc.
Research Incorporated

FINANCIAL SERVICES
ADI Research, Inc.
Burke Marketing Research, Inc.
Consumer/Industrial Rsch Svce
The Datafax Company
Datatactics, Inc.
Decision Research
Dolobowsky Qual. Svcs., Inc.
Elrick and Lavidge, Inc.
Fedder Research
First Market Rsch(L. Lynch)
First Market Rsch(J. Reynolds)
Greenfield Consulting Group,Inc.
LaScola Qualitative Research
InfoDirect, Inc.
Marketeam Associates
Moosbrugger Marketing Rsch
New South Research
The Research Center
Research Incorporated
Rockwood Research Corp.
Schrader Rsch & Rating Svce
James Spanier Associates
Total Research Corporation
TrendFacts Research
Paul A. Warner Associates, Inc.
The Winters Group

FOOD PRODUCTS
American Public Opinion Survey & Market Research Corp

Doyle Research Associates
D.S. Fraley & Associates
InfoDirect, Inc.
Mercadotecnia Consulting
Moosbrugger Marketing Rsch.
PlayLab Research
Research Incorporated
Schrader Rsch & Rating Svce
James Spanier Associates
Thorne Creative Research Svcs
Paul A. Warner Associates, Inc.
Youth Research/CSi

GERIATRIC

Burke Marketing Research, Inc.
Research Incorporated

HEALTH & BEAUTY PRODUCTS

American Public Opinion Survey
& Market Research Corp
The Answer Group
Langer Associates, Inc.
Mercadotecnia Consulting
PlayLab Research
Research Incorporated
Schrader Rsch & Rating Svce
Thorne Creative Research Svcs
Paul A. Warner Associates, Inc.

HEALTH CARE

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Arbor, Inc.
Creative Marketing Solutions
The Datafax Company
DeNicola Research, Inc.
Dolobowsky Qual. Svces., Inc.
DTW Marketing Research Group
Fedder Research
First Market Rsch(L. Lynch)
First Market Rsch(J. Reynolds)
Greenfield Consulting Group,Inc.
D.S.Howard Assoc., Inc.
InfoDirect, Inc.
Kennedy Research Inc.
LaScola Qualitative Research
Marketeam Associates
MedProbe Medical Mktg. Rsch
Moosbrugger Marketing Rsch.
New South Research
Research Incorporated
Southeastern Institute of
Research, Inc.
Strategic Marketing Services
TrendFacts Research
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HISPANIC

Analysis Research Ltd.
Bilingual Unlimited Research
Findings International Corp.
Hispanic Marketing
Communication Research
Menendez International

HI-TECH

Burke Marketing Research, Inc.
TrendFacts Research

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Analysis Research Ltd.
Brand Consulting Group
Dolobowsky Qual. Svcs., Inc.
Fedder Research
First Market Rsch(J. Reynolds)
D.S. Fraley & Associates
PlayLab Research
Research Incorporated
Thorne Creative Research Svcs
Paul A. Warner Associates, Inc.
Youth Research/CSi

INDUSTRIAL

Consumer/Industrial Rsch Svce
First Market Rsch(J. Heiman)
D.S. Howard Assoc., Inc.
Intersearch Corporation
Kennedy Research Inc.
Research Incorporated
Taylor Research
TrendFacts Research

INTERNATIONAL

Research Incorporated

MALES

Fedder Research

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ADI Research, Inc.
Creative Marketing Solutions
DTW Marketing Research Group
D.S. Howard Assoc, Inc.
Intersearch Corporation
Marketeam Associates
MedProbe Medical Mktg. Rsch

MILITARY

American Public Opinion Survey
& Market Research Corp
Mercadotecnia Consulting
Paul A. Warner Associates, Inc.

NEW PRODUCT DEVELOPMENT

Brand Consulting Group
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Decision Research
Dolobowsky Qual. Svcs., Inc.
D.S. Fraley & Associates
Faber Marketing Research
First Market Rsch(J. Heiman)
Greenfield Consulting Group,Inc.
D.S. Howard Assoc., Inc.
Langer Associates, Inc.
Menendez International
The Research Center
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Total Research Corporation
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PACKAGED GOODS

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Research Incorporated
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Thorne Creative Research Svcs
Total Research Corporation
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Paul A. Warner Associates, Inc.
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PARENTS

Doyle Research Associates
D.S. Fraley & Associates
PlayLab Research
Research Incorporated
Youth Research/CSi

PET PRODUCTS

Research Incorporated
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The Answer Group
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D.S. Howard Assoc., Inc.
MedProbe Medical Mktg. Rsch
Research Incorporated
James Spanier Associates
Total Research Corporation
The Winters Group

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& Market Research Corp
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Mercadotecnia Consulting
New South Research
Total Research Corporation
TrendFacts Research

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Thorne Creative Research Svcs

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First Market Rsch(J. Reynolds)
Langer Associates, Inc.
Research Incorporated
Paul A. Warner Associates, Inc.

SOFT DRINKS, BEER, WINE

American Public Qpinion Survey
& Market Research Corp
Mercadotecnia Consulting
Thorne Creative Research Svcs
Paul A. Warner Associates, Inc.

TEACHERS

D.S. Fraley & Associates
PlayLab Research
Research Incorporated

TELECOMMUNICATIONS

Creative Marketing Solutions
Datatactics, Inc.
Elrick and Lavidge, Inc.
First Market Rsch(J. Heiman)
D.S. Howard Assoc., Inc.
Kennedy Research Inc.
LaScola Qualitative Research
Research Incorporated
Total Research Corporation
TrendFacts Research

TELECONFERENCING

Rockwood Research Corp.

TEENAGERS

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Doyle Research Associates
D.S. Fraley & Associates
PlayLab Research
Research Incorporated
Thorne Creative Research Svcs
Youth Research/CSi

TOYS/GAMES

D.S. Fraley & Associates
Greenfield Consulting Group,Inc.
PlayLab Research
Research Incorporated
Youth Research/CSi

TRANSPORTATION SERVICES

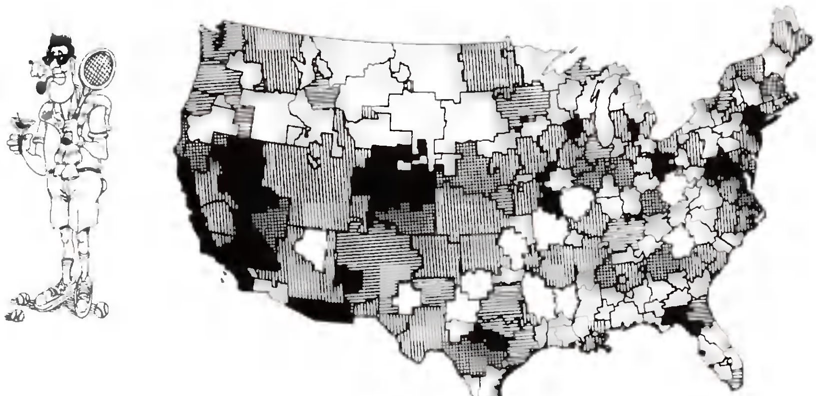
Total Research Corporation
TrendFacts Research
Paul A. Warner Associates, Inc.

TRAVEL

Research Incorporated
Schrader Rsch & Rating Svce
Total Research Corporation

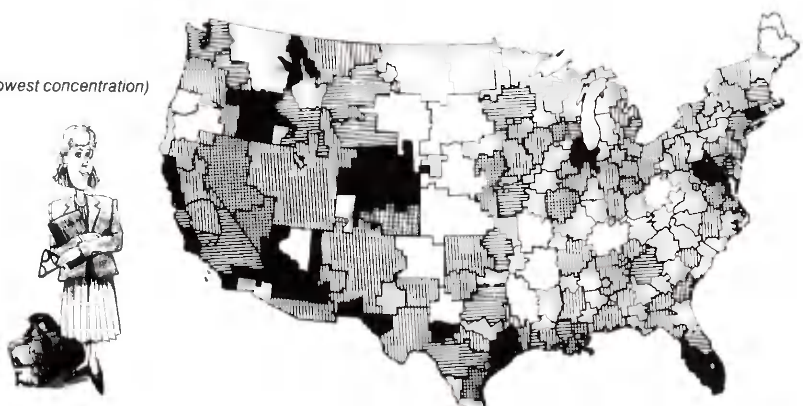
YOUTH

Doyle Research Associates
D.S. Fraley & Associates
PlayLab Research
Research Incorporated
Strategic Research Corp.
Paul A. Warner Associates, Inc.



Finer Things

■	150	(highest concentration)
▤	110-149	
▦	90-109	
▥	50-89	
□	0-49	(lowest concentration)



Advantaged Advocates

MINNESOTA MUTUAL LIFE

continued from p. 9

more than just about everything. Predominantly aged 55 to 64 with blue-collar occupations, this segment likes to eliminate the risk of financial loss, and is a good direct response prospect for reputable, established companies.

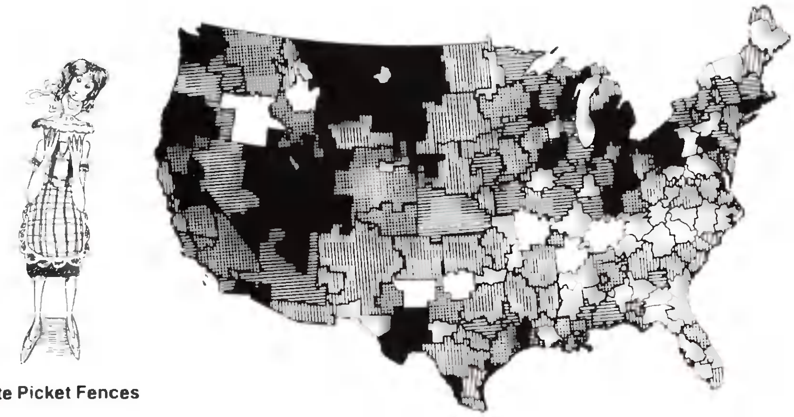
Rural Route 1

The pace here is slow and easygoing. This is a conservative group, keeping traditional values. They tend to be aged 55 and older, living in small towns and rural areas. Since "the big city" may be miles away, direct mail provides a way to obtain products easily. Financially comfortable, but not wealthy, this group is a good direct mail insurance prospect, as they tend to make their own purchasing decisions, and may not seek out advice from financial advisors.

Bare Essentials

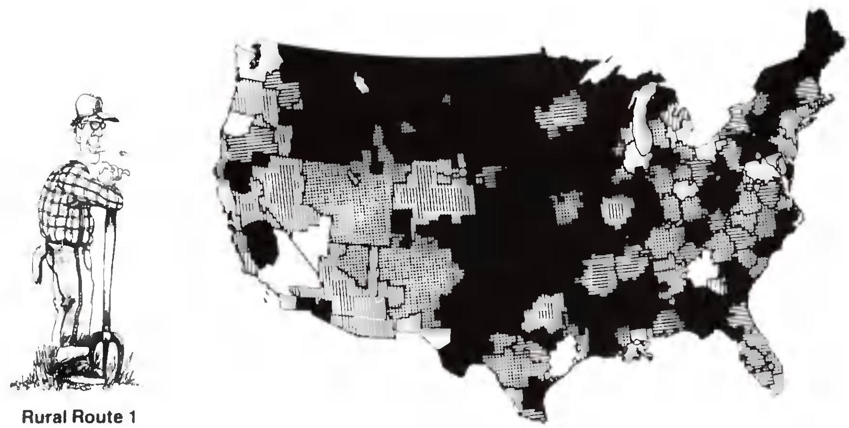
Taking one day at a time, this group lives from paycheck to paycheck on about $15,000. Most are struggling young parents or couples aged 18 to 24. One parent may work the day shift, the other the night. Like the Rural Route 1 group, financial planning assistance is not sought out. So if a product is something they feel they need, they'll purchase through direct mail.

(SRI International recently introduced VALS 2 and Minnesota Mutual will re-evaluate the customer segments with this new information, following the same procedure as before.)



White Picket Fences

150 (highest concentration)
111 149
90 109
50 89
0 49 (lowest concentration)



Rural Route 1

The development of MAPS gave the group division a clearer picture of the actual person buying the product, rather than marketing to an anonymous mass.

The MAPS information is used in a variety of ways:

•Product segmentation—deciding which product to offer to which households and the best way to market that product. For example, if the Finer Things segment appears unlikely to buy one product, there may be another product that could have more appeal for them. The right product mix is the ultimate goal.

•Non-buyer segmentation—some households just aren't worth the sales effort. These households can be deleted from the start, which means eliminating administration costs associated with preparing a mailing, as well as postage costs.

•Market analysis—keeping up with how our markets and our buyers are changing.

•New product development—the database work has provided greater insight into the gaps that exist in the product offerings and where new product efforts should be concentrated.

Efficient database management has revolutionized the marketing of group products, but has it increased revenue? A variety of techniques is used to find out.

Both point-of-sale and direct response activity are continually tracked. Extensive tests also pit products against one another. In general, new strategies are tested against what would have been done without the added MAPS information and are judged on the basis of premium generation. What is being tested and judged is not just the data or the system, it's all of the parts that went into the execution of the particular program—that includes the type of consumer, the product, the timing issues (seasonality)—anything that could have an effect on whether or not a consumer will buy.

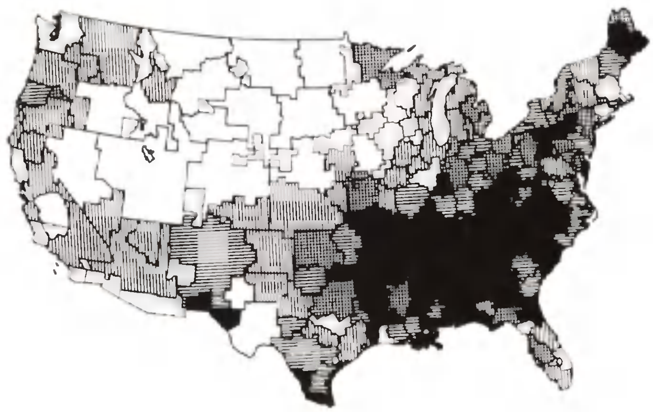
The customer profiles developed through our analysis also add value to the service package delivered to the financial institution clients. Many clients have asked that their portfolios be analyzed and marketing recommendations made.

Minnesota Mutual's database marketing expertise in group-related products is the base formula for realizing even greater corporate-wide potential. The analytical methods used for the group data could be applied to other product lines: a larger agency force sells individual insurance, and the company has pension and asset management divisions and a fire and casualty affiliate. The need now is for a corporate-wide Customer Information File (CIF).

Currently, data for all the various product lines is stored in separate databases. First, a CIF would merge data from all the databases and allow standardization of data collection, storage and analysis so that effectiveness of marketing programs can be measured globally. Second, with all product lines' data merged into one database, cross-sell opportunities can be explored, allowing Minnesota Mutual increased market share. And finally, increased information can be made available at point-of-sale. By having various database and segmentation information available via computer, the sales attempt can be that much more effective.

The "revolution" of Minnesota Mutual's databases has now turned into a process of "evolution." The databases must adapt to accommodate an ever-changing marketplace—they cannot remain static. The company must meet the marketing challenge that the 90s present and continue to provide customers with products that will truly meet their needs. Proper database management will help meet that challenge. MRR

Bare Essentials



Nance Olson is a senior market data analyst with St.Paul-based Minnesota Mutual. She is responsible for the tracking of data and analysis of databases to look for marketing opportunities. She received a bachelor of arts degree from Augsburg College in Minnesota and was previously employed at Rockwood Research Corporation.

MINNESOTA
MUTUAL LIFE

Respondent interpretations

continued from p.14

procedures. Depending on time and resource constraints, everyone in the sample can be included in the frame-of-reference probing, or respondents can be subsampled and the additional probing questions asked of only a percentage.

Preparation

In advance of data collection, the following basic decisions need to be made:

1. Decide when during the questionnaire design process to probe respondents' interpretations.

During the questionnaire development, probing to determine respondent frame of reference for key concepts can facilitate improvements in question wording and thereby avoid collecting data that cannot be properly analyzed statistically. This type of question investigation can warn the survey designer of ambiguities that will cause respondent confusion and irritation. If ambiguities concerning the meaning of questions are present, it is likely that the interviewers will be asked to explain what is meant or what type of answer is wanted. When interviewers are asked to explain questions, the chance of interviewer bias increases dramatically.

If probing to determine respondent frame of reference is included in the final questionnaire used for the survey, it can help to illuminate the answers provided in the survey. The answers to the probing questions may help the survey analyst to understand what appear to be inconsistent answers. And in a repetitive survey, problem questions can be deleted or changed for subsequent interviews.

2. Decide which words or phrases to probe.

Words or phrases that are central to collecting uniform information and thought to be susceptible to misinterpretation should be subjected to investigation. For example, in a study designed to evaluate the seriousness of various crimes, the respondent might be asked to rate the seriousness of an event described as "An offender injures a victim and the victim dies." To know whether the respondent answered in general terms or attributes specific circumstances to the event before rating its seriousness, additional probing should be done to determine how each respondent interpreted the question.

3. Decide where in the interview to probe.

If the questions added for the frame-of-reference probing do not disrupt the interview (by changing the subject, for example) and are not expected to bias the remaining survey questions, then it is probably best to ask them immediately after the question where the word or phrase of interest appears. By placing the probing questions immediately after the survey questions of interest, there should be no doubt as to what word or phrase is being referenced. If the probing questions might disrupt or bias the interview (such as detailed questions about sources of income, traffic accidents, or the nature of mental illnesses in the family), those questions could be placed near the end of the interview and preceded with a transition statement such as "Earlier I asked you about...; now I have just a few more questions about that."

4. Arrange probing so that only a few questions (two to four) are probed with a *respondent.*

The number of survey questions to be investigated by frame-of-reference probing is decided by the researcher. However, if more than about two to four words or phrases are to be investigated, it might be better to limit the number subjected to probing with any one respondent and interview a larger number of persons to collect enough data. Important considerations in setting the number of questions to be investigated are the total length of the interview and the respondent's tolerance for being questioned in detail on subjects for which he or she may have little interest and/or knowledge. Unless the respondents selected for this type of interviewing are known to be especially knowledgeable or interested in the topics to be probed, it may be best to assume a low level of knowledge and interest and arrange the probing questions accordingly.

5. Determine how many and what kind of probes to use to investigate each word or phrase under study.

The optimal number of questions used to determine the meaning attached to a word or phrase is probably about three to five. If too few probes are used, there is the risk of superficial or inadequate treatment of the subject; if too many are used, there is the risk of being tedious, appearing to challenge or question a respondent's views, beliefs, or attitudes, or of appearing to be administering a test in which these are "right" and "wrong" answers.

Clearly, adding questions to an interview results in a more time-consuming interview. In addition, there may be some respondents who will dislike being asked to report information such as what they were thinking about when they answered a question, or other questions requesting them to think about how they think about things. If the probing questions are carefully worded, it should be possible to avoid putting respondents "on the spot." An illustration of a question that was carefully constructed to avoid putting a person "on the spot" is: "Speaking of crime, everyone agrees some acts are crimes, but there are different ideas about others. Do you believe it is a crime for someone to...?"

6. Arrange a method of probing and presentation of additional questions.

The method of probing depends on the stage of the questionnaire design process at which the technique is used. When it is used for questionnaire development, it might be more useful to the researcher if interviewers are given guidance on what information is desired and then allowed to develop their own follow-up questions. To some extent, the choice between structured and unstructured methods during developmental work depends on the level of experience of the interviewers; less experienced interviewers and those not familiar with research methods may require more structured assignments.

If used during the survey itself and if all respondents are to be asked all frame-of-reference probing questions, the follow-up questions should be printed on the questionnaire so that they will be asked in the same way, and at the same time during the interview, of all respondents.

7. Establish a system to record results of the probe.

Two common ways of recording results of unstructured interviewing are tape recording and having a second person accompany the interviewer to take notes. If structured questions are used (with printed questions to be read), then precoded answers may be developed to aid the interviewer in recording the answers quickly.

8. Develop a technique for reconciling survey question response with probing response if the two answers are expected to be the same.

Sometimes the frame-of-reference probing questions ask for the same type of information as the survey question, but in a different manner. When the same type of information is asked, the respondent may seem to give quite different or contradictory responses to the frame-of-reference probing than he or she did to the survey question. Reconciliation of responses is important for these cases. If this happens, the interviewer might say, "In light of what you've just been saying, I'd like to go back and ask again one of my earlier questions;...(repeat question)."

Operation

Since frame-of-reference probing is generally done in conjunction with one of the stages of testing or with the survey itself, the selection of a site and other operational details are taken care of in planning for the main event. Some additional details may be necessary to accommodate the use of this technique, however. For example, if experienced interviewers rather than researchers are involved, they may require extra training on how to ask the additional questions. If unstructured probing is required, the training may be longer, more complicated, and different in content than if structures questions are added to the questionnaire.

If a decision is made to use frame-of-reference probing questions for a subset of respondents rather than for all of them, additional interviewer instructions may be necessary.

Data analysis is the final step in the operation of frame-of-reference probing. Analysis focuses on responses to the probing questions and may also include their relationship to some of the other subjects of interest in the survey. Take, for instance, the example cited earlier in which respondents are asked to consider the seriousness of the following statement: "An offender injures a victim and the victim dies." Do people who imagine the injury to be inflicted during a barroom brawl rate the seriousness of the crime the same as or different from people who imagine it to have been the result of a traffic accident? Differences in the responses of male versus female respondents or consistencies in the pattern of a single respondent's replies to a variety of such vignettes may also be of interest. If there is no differentiation among the ranking of crimes which are considered quite different by the questionnaire designer, there may be either a problem with the language in question (suggesting that the wording should be changed), a problem with the researcher's notions about the seriousness of the crimes (suggesting that different examples be included), or perhaps a problem with the respondent's ability to make the desired distinctions (suggesting that the questions should be deleted). Such an analysis conducted in the conjunction with the final survey may provide explanations for some of the results from the analysis of the survey data.

Time considerations

For the most part, the time required for planning and executing frame-of-reference probing overlaps preparation for the survey or test to which it is being appended. The selection of the testing vehicle, the data collection, and the data analysis all occur simultaneously with operations for the test or survey. Thus, the additional time necessary to use this technique is minimal. Drafting the probing questions (or deciding what information is required from unstructured probing) cannot take place until after the questions containing the words or phrases of interest are written, and it must be done before the interviewers who will administer the questions are trained.

Analysis of the information collected from unstructured frame-of-reference probing may take longer than from structured probing, since an additional coding phase may be required.

Cost considerations

In general, the cost factors involved in frame-of-reference probing, over and above those of the test or survey itself, are slight. Additional expenses may be incurred for reproduction of questionnaires or interviewing materials, interviewer salaries for longer interviews, and salaries for the researchers/questionnaire designers. If members of the research staff conduct the interviews, cost of travel and related expenses, and extra salary expenses will also be incurred.

Mode of data collection

Frame-of-reference probing is suited for use in designing interviewer-administered surveys, either face-to-face or telephone. It could also be used in a face-to-face test of a mail questionnaire, but mail questionnaires themselves are not well-suited to the technique. Structured follow-up questions could be incorporated into a mail questionnaire, but since the respondent is free to answer questions in any order and over a long period of time, the responses to the probing questions may not be good indicators of what respondents had in mind when answering certain questions. MRR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Index of Advertisers

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Trade Talk

continued from p. 58

including a Morris centerfold, a guide to giving your cat a bath, a history of cats in the arts, and a hilarious piece, written from a cat's perspective, called "How to Run a Household." For anyone who's ever owned—or, rather, been owned by—a cat, this piece is uncanny proof that cats do the same crazy stuff all over the world. (Here's one of the best: "When you have ordered that an outdoor door be opened for you, stand half in and half out and think about various things. This is particularly important during very cold and very hot weather, and during mosquito season.")

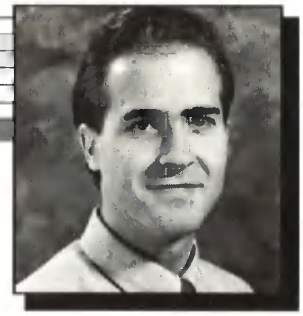
In addition, there are several departments, including an advice column written by a veterinarian, and a host of cat tales of all kinds sent in by readers—short stories, odes, you name it.

Judging by the enthusiastic tone of the reader-submitted material, *The Morris Report* seems to have found its niche. Brown concurs.

"Among the people that are receiving it, it has been a tremendous success. We get a large amount of favorable mail, roughly 40% of the editorial is actually written by subscribers."

But the company would like to see the magazine have a broader reach.

"We are considering a more comprehensive direct marketing effort, and we see *The Morris Report* as being an element within that overall direct marketing effort. We have to devote more time to it, to go out and market it more aggressively. The first time around, we were just trying to get it off the ground. Well, we've gotten it off the ground, now it's time to take it to the next level." MRR



By Joseph Rydholm
managing editor

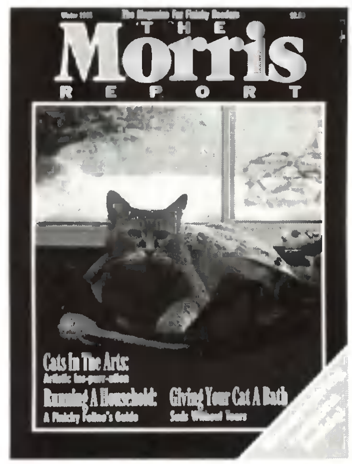
Magazine purrs along nicely

A company that has a well-known character associated with its product(s) has a valuable asset. Consumer brand recognition can be instantaneous, providing crucial inroads for promotional messages. One of the best known of these "characters" is Morris the Cat, spokesfeline for Star Kist's 9 Lives line of cat food.

The company has long run offers on 9 Lives products for Morris paraphernalia (posters, calendars, etc.), and Morris even made a bid for the White House last year. As an integral part in cementing Morris' place in the hearts of cat owners everywhere, Star Kist has taken the Morris phenomenon to its next logical step: a magazine devoted to the Finicky One.

Titled, modestly enough, *The Morris Report*, the magazine is published four times a year and is available by subscription for $7.95. The magazine was introduced nationally in 1987 with a free standing insert in Sunday newspapers, and free copies were mailed to thousands of cat owners, whose names were obtained from 9 Lives' mailing list. In addition, the magazine was sent to over 15,000 veterinarians for placement in waiting rooms.

The idea for the magazine was brought to 9 Lives by special interest publisher Alan Weston Communications, who believed that with a strong character such as Morris, they could create a magazine around him that would fulfill two objectives for 9 Lives, says 9 Lives product manager Eric Brown.



First, it would allow them "to have an ongoing dialog and develop a one-on-one relationship with the cat owning public—which is about 30% of all households. Second, it provided an efficient vehicle to begin building our own in-house database," Brown says.

Having such a data base, Brown says, allows the company to deliver its promotions and communications more efficiently. To that end, each issue contains money saving coupons for 9 Lives products and a section called The Morris Mart which offers merchandise such as a Morris jigsaw puzzle to readers for cash plus proofs of purchase.

This section has gotten good response from readers, Brown says, and with the cash plus proofs concept, it's an excellent way to ensure continuity of purchase of 9 Lives products.

To make sure that readers would also respond well to the other sections, focus groups were held during the magazine's creation to find out what prospective readers would (and wouldn't) like to see in such a publication.

"They were very valuable also in helping us to find what our specific editorial content and direction ought to be," Brown says of the focus groups. "We put together a mock publication with a table of contents and we went through some of our ideas for what might be in the magazine in an on-going basis and what some of the features might be. We also got a feel for what the mix might be between entertaining versus informational articles."

The most recent issue boasts 52 cat lovin' pages of material,

continued on p. 57

BIG AS TEXAS

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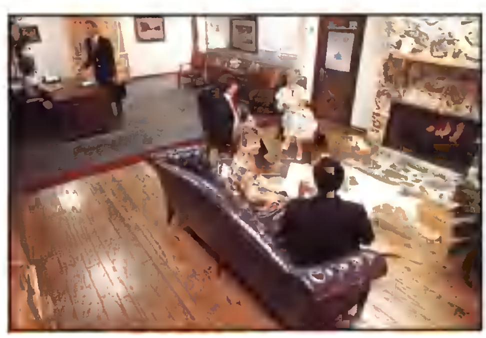

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