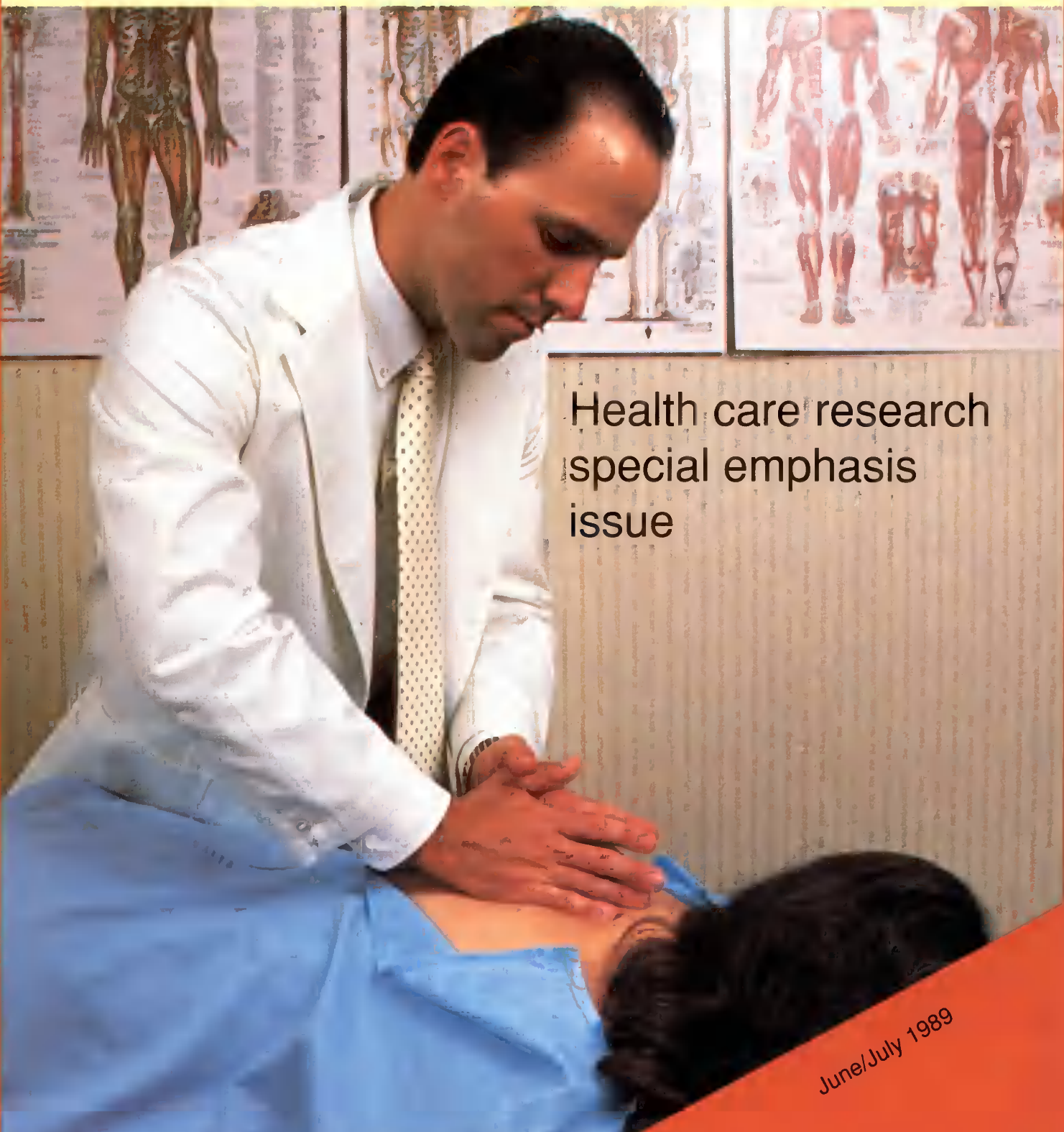


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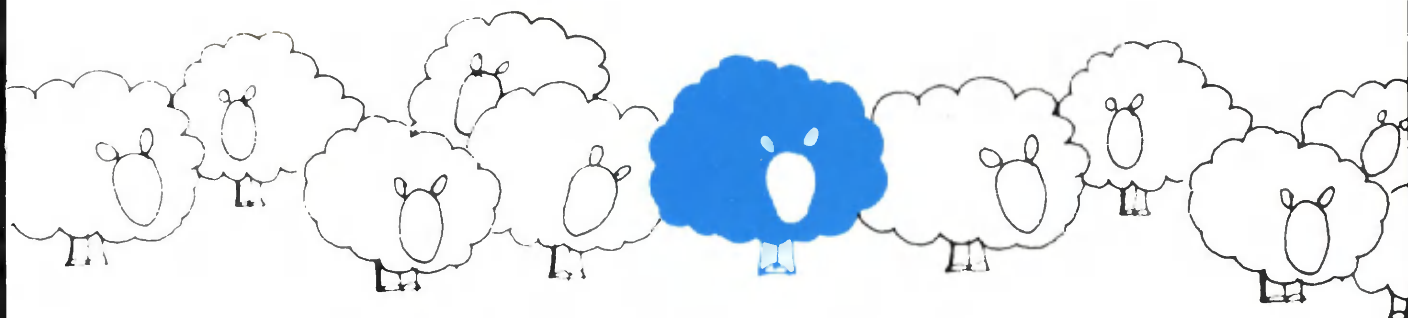


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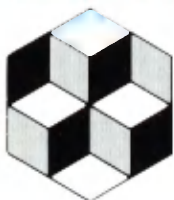
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Quirk's MARKETING RESEARCH Review

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June/July, 1989

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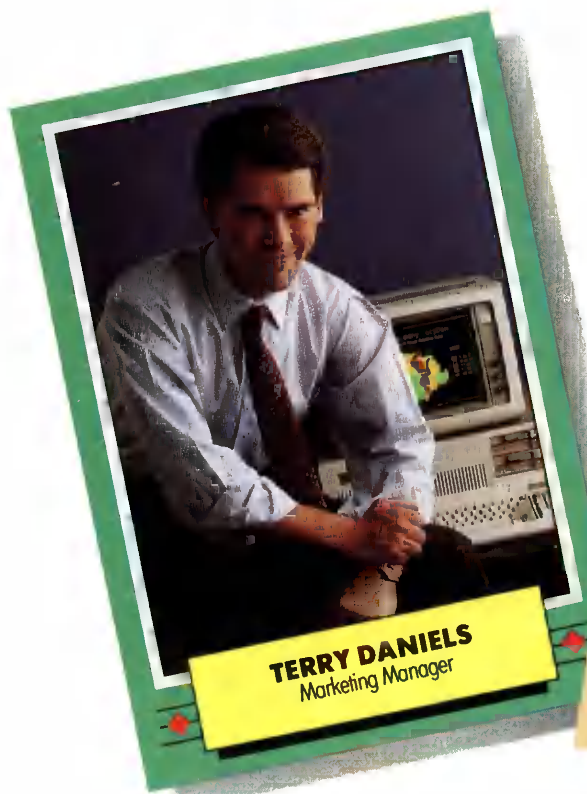
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Mail survey tests awareness of



In order to determine its position in the chiropractic marketplace, Phoenix-based Activator Methods, Inc. commissioned a nationwide mail study of chiropractors.

Specifically, says Dr. Arlan W. Fuhr, president of Activator Methods, the company sought to measure the level of awareness and usage of the Activator instrument, one of many techniques used in chiropractic. In addition, they wanted to find out which attributes chiropractors felt were most important in a technique.

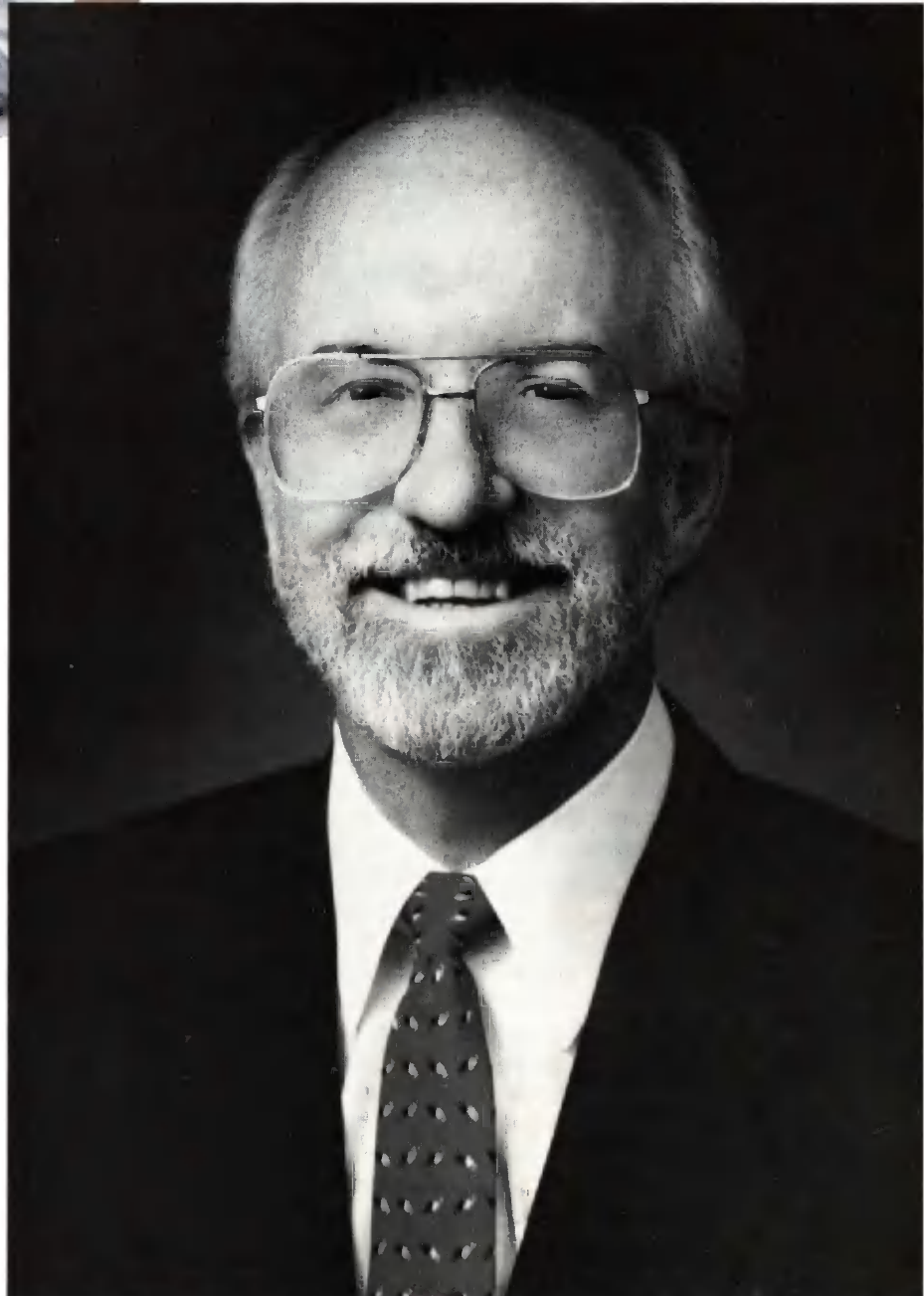
“We did the market survey to find out where we were and how we ranked,” Fuhr says, “because if you don’t know where you’re at, you can’t find out where you’re going.”

The Activator instrument is a patented device which uses a metered force to make adjustments to the patient, in contrast to what Fuhr calls the “more forceful” manipulation of chiropractic methods like Gonstead, Thompson and Diversified.

“It moves the bone a minute amount and activates mechano receptors which in turn cause muscles to contract and help the deranged nerve function return to normal,” he says.

Methodology

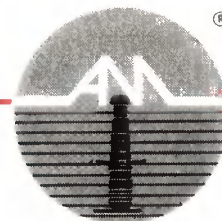
The survey, conducted by Olsen Marketing, Inc., Willmar, Minn., was sent to 1036 chiropractors nationwide in the



Dr. Arlan W. Fuhr

chiropractic technique

by Joseph Rydholm
managing editor



summer of 1986, using a random sample from the mailing list of a chiropractic magazine. Each packet contained a personalized cover letter (which began with the appeal "Chiropractors across the nation need your help!"), with a quarter affixed as an incentive, the four page survey, and a stamped return envelope—all of which came in under the 1 ounce first-class limit.

The questionnaire and its contents gave no indication of who was conducting the survey. "It was mailed under the name and letterhead of Professional Mail Surveys," says Chris Olsen, president of Olsen Marketing. "The doctors had no idea who was conducting the survey, whether it was an association, a government agency or one of the chiropractic technique developers."

Olsen says a mail survey was chosen for three reasons.

"First, it allowed us to do a more thorough evaluation and study of the corporate recognition and image of Activator Methods. Second, it was less expensive than a phone survey, and third, it allowed us to reach busy doctors not always available for or receptive to phone surveys."

To make sure the doctors wouldn't balk at the idea of completing the survey, it was designed to look open, easy to read, and not time consuming.

High response rate

The survey enjoyed a response rate of over 30%, with 283 of the 330 returns qualifying for use in the study. Though Olsen is unable to explain the high response rate, he speculates that perhaps the chiropractors responded to the cover

letter's entreaty.

Also, he says, "I think maybe the chiropractic doctors had never been approached before in this manner, so I think they were more open to it, their curiosity was piqued."

The chiropractors were asked about the following topics:

Technique

Which technique (or combination of techniques) did they use most, and how satisfied were they with it? (Some chiropractors, Fuhr notes, mix treatment methods in the belief that different techniques are more effective in certain situations.)

In addition, their familiarity with seven techniques, including Activator, was gauged—using a scale from "know it well" to "never heard of it,"—as was their awareness of advertising of seminars for the various methods. Also, each of the techniques was assessed on a number of criteria, including effectiveness, ease of use, safety, widespread acceptance, and the level of research validation.

Education and seminars

How often did they attend seminars and for which techniques? How satisfied were they with the seminars? They were also asked which areas they saw as the most important to gather knowledge in in the next 12 months: technique, practice-building (office management), or both.

Chiropractic newsletters and periodicals

Which chiropractic publications did they receive and read regularly, and what

was their favorite?

Personal statistics

This section gathered information on age, number of years in practice, average number of patients and income per week, overall income, and college attended.

(Determining which chiropractic college each respondent attended was important, Olsen says, because their educational background influences their opinions of the various methods, as most colleges primarily teach the Diversified method, offering instruction on other methods only on an elective basis.)

Findings

As expected, the Diversified technique was the most used, followed by Gonstead and Activator. A total of 41% said they knew the Activator technique "well" or "moderately well," as compared to 44% for Cox, and 67% for Gonstead. Activator was the most recognized technique in the section on awareness of advertising on technique seminars.

Fuhr says he was pleased with Activator's third place showing, as some of the techniques had been around since the turn of the century and Activator is comparatively new. In fact, he says, finding out that Activator was number three made him feel a bit like Lee Iacocca.

"It said to me: We're number three (overall), but we're going to be number one, period. So it provided us with a goal."

Chiropractors also rated the technique highly in two important attribute areas: it achieved the highest "ease of use" score,

continued on p. 28

Research steers



nightclub's repositioning

Not long after it opened last year, Horsefeathers nightclub in Louisville, Ky., achieved a moderate level of success. During the week, happy hour crowds kept revenues at a steady level. But when it came to late night clubgoing, the crowds chose to go elsewhere.

To change that, Flautt Properties, which also runs four other Horsefeathers in the U.S., sought the help of the Enterlink Co., a Houston-based firm specializing in marketing research and consulting for the nightclub industry.

David Townsend, president of Enterlink, conducted computer-assisted surveys and focus groups with customers and employees. In conjunction with the



Popular promotions such as Thursday night alligator races have helped Horsefeathers nightclub achieve a 250% increase in monthly sales.

research, he performed a market analysis, reviewed club operations, suggested design changes and guided increased promotional efforts.

"We brought him in because we felt like we were missing the boat somewhere. We weren't analyzing something right," says Vern Heitzenrader, general manager of Horsefeathers.

"We wanted to see what he could do with this club because we needed something to happen. With his consulting, it happened."

The club was designed to resemble a Ralph Lauren Polo shop, decorated with horse paraphernalia, polo equipment, and

continued on p. 29

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Leaving an HMO: What does the member remember?

Most health maintenance organizations conduct periodic research with members who have ended their coverage with a particular plan. Typically, this is done to determine if any pattern of dissatisfaction has caused this exodus, says Lynne Cunningham, vice president for health care research, KCA Research Inc.

“The HMO is trying to find out why someone made the switch, in the hopes not so much that they can get that person back but that they can plug the hole so that they don’t lose more people for the same reason.”

Results of most surveys show that many of the members who have switched plans did so because they:

- changed employers and the new employer didn’t offer the HMO;
- moved out of the geographic area covered by the HMO;
- switched to a less expensive plan;
- selected a plan with more comprehensive coverage because of a family status change, i.e. marriage or birth of a child.

“Reasons for leaving are very consistent with what we hear in patient- or member-satisfaction research,” Cunningham says. “You leave because you can’t get the access you want, you can’t get an appointment, you can’t see the doctor you want to see. Another reason that we’re hearing more and more these days is that the cost has gone up. People will say ‘My employer

is covering XYZ HMO completely, and they’re not covering ABC HMO completely and I just can’t afford to keep paying out of my pocket, so I have to switch.”

Most surveys with members who have terminated their coverage with one health plan are conducted by mail and response rates vary considerably. To solicit information from a more randomly selected sample of health plan members who had changed coverage, KCA recently completed a telephone survey for one of its HMO clients.

Cunningham says a telephone survey was undertaken because the client wanted the information quickly.

“Mail surveys usually take two mailings to get effective returns. And with this telephone survey, we got a better response rate and we got more random responses

than we typically would get from a mail survey. To use an example, if you had just switched toothpaste brands, and six weeks later you get a letter (from your former brand) asking why you switched, how much incentive do you have to respond? But if I call you Tuesday evening in the middle of dinner, you’re probably more likely to respond.”

The client is a group practice model HMO which provides care at a series of centers throughout a major metropolitan area. Members are seen at these centers by physicians who only see HMO participants. The doctors do not have separate fee-for-service private practices in other locations.





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KCA called members who had "voluntarily terminated" their coverage during 1988. These potential respondents had stayed with the same employer but selected a different health plan.

Specific result of the survey are proprietary but the recollection of health plan switching produced an intriguing pattern.

300 members who had terminated their coverage were contacted. The following results are interesting and may produce a pattern which will be repeated in surveys with other members who have changed health plan coverage.

- Six percent do not have any current health plan coverage.
- 40 percent reported switching to a variety of other HMOs.
- 12 percent report still belonging to the client HMO.

Perhaps the most amazing finding of the survey is that over 40 percent of the survey participants did not remember switching health plans in the past year. When these people were specifically told that health plan records showed they had



switched, almost three fourths still denied making a change. Upon further probing with this group it was found:

•Over 80 percent said no one else in their household had changed health plans in the last year.

•Over 80 percent said they had never belonged to an HMO.

•Only three fourths of the respondents who remembered they had switched health plans in the last year said this switch was from the client health plan.

Cunningham says these results surprised everyone. "We were flabbergasted. It wasn't as if we had a list that we knew was going to have some inaccuracies in it, we had a list from the client of people they knew had switched.

"If you had switched from Aetna to Prudential, for example, I would not at all have been surprised at those results, but the client in this case was a staff model HMO, which means that you go to the HMO's clinic for your care, and if you go anyplace else (it isn't covered), so it's not as if you can go to your regular doctor and not remember that your health insurance has changed."

While neither KCA nor the client HMO can explain why so many respondents knew so little about the status of their health plan, Cunningham hopes that making other HMO's aware of the survey's findings will enable an explanation to be found through further research. MRR

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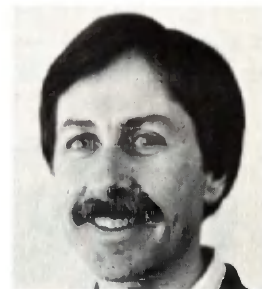
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Understanding conjoint analysis in 15 minutes

by Joseph Curry

Joseph Curry is a vice president of Sawtooth Software, a company that writes and markets microcomputer software for marketing research. Since 1978, Curry has been involved in the development of microcomputer software systems for interactive interviewing and data analysis.



Conjoint analysis is a popular marketing research technique that marketers use to determine what features a new product should have and how it should be priced. Conjoint analysis became popular because it was a far less expensive and more flexible way to address these issues than concept testing.

The basics of conjoint analysis are not hard to understand. I'll attempt to acquaint you with these basics in the next 15 minutes so that you can appreciate what conjoint analysis has to offer. A simple example is all that's required.

Suppose we want to market a new golf ball. We know from experience and from talking with golfers that there are three important product features:

Average Driving Distance
Average Ball Life
Price

We further know that there is a range of feasible alternatives for each of these features, for instance:

AVERAGE DRIVING DISTANCE	AVERAGE BALL LIFE	PRICE
275 yards	54 holes	\$1.25
250 yards	36 holes	1.50
225 yards	18 holes	1.75

Obviously, the market's "ideal" ball would be:

AVERAGE DRIVING DISTANCE	AVERAGE BALL LIFE	PRICE
275 yards	54 holes	\$1.25

and the "ideal" ball from a cost of manufacturing perspective would be:

AVERAGE DRIVING DISTANCE	AVERAGE BALL LIFE	PRICE
225 yards	18 holes	\$1.75

assuming that it costs less to produce a ball that travels a shorter distance and has a shorter life.

Here's the basic marketing issue: We'd lose our shirts selling the first ball and the market wouldn't buy the second. The most viable product is somewhere in between, but where? Conjoint analysis lets us find out where.

A traditional research project might start by considering the rankings for distance and ball life in Figure 1.

RANK	AVERAGE DRIVING DISTANCE	RANK	AVERAGE BALL LIFE
1	275 yards	1	54 holes
2	250 yards	2	36 holes
3	225 yards	3	18 holes

Figure 1

This type of information doesn't tell us anything that we didn't already know about which ball to produce.

Now consider the same two features taken conjointly. Figures 2a and 2b show the rankings of the 9 possible products for two buyers assuming price is the same for all combinations.

BUYER 1	AVERAGE BALL LIFE		
	4 holes	36 holes	18 holes
AVERAGE DRIVING DISTANCE 275 yards	1	2	4
250 yards	3	5	7
225 yards	6	8	9

Figure 2a



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BUYER 2	AVERAGE BALL LIFE		
	54 holes	36 holes	18 holes
AVERAGE 275 yards	1	3	6
DRIVING 250 yards	2	5	8
DISTANCE 225 yards	4	7	9

Figure 2b

Both buyers agree on the most and least preferred ball. But as we can see from their other choices, Buyer 1 tends to trade-off ball life for distance and whereas Buyer 2 makes the opposite trade-off.

The knowledge we gain in going from Figure 1 to Figures 2a and 2b is the essence of conjoint analysis. If you understand this, you understand the power behind this technique.

Next, let's figure out a set of values for driving distance and a second set for ball life for Buyer 1 so that when we add these values together for each ball they reproduce Buyer 1's rank orders. Figure 3 shows one possible scheme.

BUYER 1	AVERAGE BALL LIFE			
	54 holes	36 holes	18 holes	
	50	25		0
275 yards	(1)	(2)		(4)
100	150	125		100
AVERAGE				
DRIVING 250 yards	(3)	(5)		(7)
DISTANCE 60	110	85		60
225 yards	(6)	(8)		(9)
0	50	25		0

Figure 3

Notice that we could have picked many other sets of numbers that would have worked, so there is some arbitrariness in the magnitudes of these numbers even though their relationships to each other are fixed.

Next suppose that Figure 4a represents the trade-offs Buyer 1 is willing to make between ball life and price. Starting with the values we just derived for ball life, Figure 4b shows a set of values for price that when added to those for ball life reproduce the rankings for Buyer 1 in Figure 4a.

BUYER 1	AVERAGE BALL LIFE			
	54 holes	36 holes	18 holes	
	50	25		0
PRICE \$1.25	1	4		7
1.50	2	5		8
1.75	3	6		9

Figure 4a

BUYER 1	AVERAGE BALL LIFE			
	54 holes	36 holes	18 holes	
	50	25		0
\$1.25	(1)	(4)		(7)
20	70	45		20
PRICE 1.50	(2)	(5)		(8)
5	55	30		5
1.75	(3)	(6)		(9)
0	50	25		0

Figure 4b

We now have in Figure 5 a complete set of values (referred to as "utilities" or "part-worths") that capture Buyer 1's trade-offs.

AVERAGE DRIVING DISTANCE		AVERAGE BALL LIFE		PRICE	
275 yards	100	54 holes	50	\$1.25	0
250 yards	60	36 holes	25	1.50	5
225 yards	0	18 holes	0	1.75	0

Figure 5

Let's see how we would use this information to determine which ball to produce. Suppose we were considering one of two golf balls shown in Figure 6.

	DISTANCE BALL	LONG-LIFE BALL
DISTANCE	275	250
LIFE	18	54
PRICE	\$1.50	\$1.75

Figure 6

The values for Buyer 1 in Figure 5 when added together give us an estimate of his preferences. Applying these to the two golf balls we're considering, we get the results in Figure 7.

BUYER 1	DISTANCE BALL		LONG-LIFE BALL	
DISTANCE	275	100	250	60
LIFE	18	0	54	50
PRICE	\$1.50	5	\$1.75	0
	105		110	

Figure 7

We'd expect Buyer 1 to prefer the long-life ball over the distance ball since it has the larger total value. It's easy to see how this can be generalized to several different balls and to a representative sample of buyers.

These three steps-- collecting trade-offs, estimating buyer value systems, and making choice predictions--form the basics of conjoint analysis. Although trade-off matrices are useful for explaining conjoint analysis as in this example, not many researchers use them nowadays. It's easier to collect conjoint data by having respondents rank or rate concept statements or by using PC-based interviewing software that decides what questions to ask each respondent, based on his previous answers.

As you may expect there is more to applying conjoint analysis than is presented here. But if you understand this example, you understand what conjoint analysis is and what it can do for you as a marketer. MRR

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Hilton uses research in creation of vacation promotion

With “9 to 5” becoming more like “9 to whenever I can get out of the office,” and the pressure increasing to achieve self-actualization while raising kids, doing the dishes, and picking the dog up at the vet, it’s getting more difficult to step out of the fast lane and relax.

The two-week vacation, considered almost a Constitutional right by most Americans, is quickly becoming an endangered species. And according to a recent nationwide survey commissioned by Hilton Hotels Corp., even weekends are no longer a time to take it easy.

Hilton used the survey, which questioned 1000 adults on their weekend leisure and work habits as a part of OmniTel, a weekly national telephone omnibus service of R.H. Bruskin Associates, as a basis for creating the Hilton BounceBack Weekend, a program offering consumers an affordable chance to leave their stress and responsibilities behind and spend a weekend at any of the more than 250 participating Hilton Hotels and Resorts across the country.

“We suspected, just from our own personal experience, that the work week was being extended into the weekend,” says Robert E. Dirks, vice president, marketing, Hilton Hotels Corp. “People really don’t use weekends the way they were meant to be used. So we thought we would do some research to see if our hunch had any validity.”

It was right on target. Weekends, it turns out, don’t live up to their name for



most people. Instead, they are a chance to catch up on all the various chores there didn’t seem to be time for during the week.

According to the survey:

- The average adult spends nearly a full weekend day (14 hours)—about twice as much time as they would prefer to spend—cleaning, doing laundry, running errands, grocery shopping, paying bills, and doing household repairs.

- 90 percent of Americans feel no more energetic at the end of the weekend than they do on Friday. So much for relaxation.

Most of the respondents, especially women, indicated that the best way to relax would be to get away for the weekend and leave household responsibilities behind. But they indicated that family responsibilities and other time commitments stood in their way. Cost was also seen as a barrier.

Brainstorming

Once the results were in, Hilton assembled teams from its ad agency, McCann-Erickson, its public relations firm, Burson-Marsteller, and its marketing department and held brainstorming sessions. It all came down to one question: “How do you recharge yourself after the work week?”

As an answer to that question, Hilton introduced the BounceBack Weekend program in March.

“We decided to position our weekend leisure program as an emotional end-benefit, versus a program like our competitors have based on price strategy alone. And that’s where we got into the stress concept and the problems of having the work week tied into the weekend,” Dirks says.

In conjunction with the BounceBack Weekend, Hilton enlisted stress expert Peter G. Hanson, M.D., to write “The Hilton BounceBack Guide,” a booklet containing tips on reducing stress levels.

The guide, available upon check-in or by calling the Hilton BounceBack Hotline, offers useful common sense advice,

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Thanks a lottery

One of every two American adults (49%) have, at some time in the past, purchased a ticket for the weekly million dollar lotteries that are held by many states in the U.S. Of these purchasers, 25% say they buy a ticket "just about every week;" 11% about every other week; 17% once a month; 23% less often

than that, and a surprising 24% "only when the jackpot is way up in the millions."

Obviously, the reference is to the 20, 30, 50 and even 100 million dollar jackpots that have been occurring in recent months. Any one of those prizes would probably be more than most people could

cope with in the course of a lifetime. So why not consider an alternative—creating more multi-million dollar prizes, to be shared by more people?

That's the question posed to a national sample of over 1,000 adults in a recent OmniTel study, the continuing omnibus service of R.H. Bruskin Associates.

Specifically, the question was: "Some states are considering a change in their method of selecting winners when the jackpot exceeds 10 million dollars. Instead of one set of six winning numbers there would now be two sets; that is, a person would have two chances to win. First they'll draw one set of six numbers, followed by a second drawing of another six winning numbers. The result would be more winners splitting the jackpot. Would this make you more interested in buying lottery tickets, less interested, or wouldn't it make any difference to you?"

If this were to happen, 45% of all lottery ticket buyers indicate that they would be even more interested in buying tickets, only 8% say they would be less interested, and 47% indicated that it wouldn't make any difference to them.

Consumers rate quality of foreign and U.S. goods

A recent survey of 1,001 adult heads of households conducted by Opinion Research Corp. reveals that most affluent

continued on p. 42

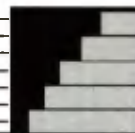
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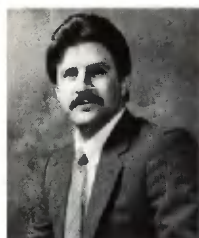
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NAMES OF NOTE



Victor Matera has been promoted to director of marketing research for *Hilton Nevada Corp.*



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Burke

William J. Burke has been promoted to corporate vice president of *Fitch RichardsonSmith*, Worthington, OH. He is head of the company's market strategy & research group.

Total Research, Princeton, NJ, announces the following staff additions/changes: **Paul Prekopa** has joined the firm as a senior research analyst. Previously, he was project director at Brown, Koff & Fried, a New York City market research firm. **Joanne Mechling** has also joined the firm as a senior research analyst. Previously, she was project director at The Data Group, Inc. Plymouth Meeting, PA. **John Morton** has been promoted to senior vice president, director of advanced statistical research. **Lisa Marie Howell** has been promoted to senior research analyst.

James Storbeck has joined *Catherine Bryant & Associates*, Clemmons, NC, as project director. **Julie Giese** has joined

the firm as a research assistant. **Rita Lewis** has been promoted to lead interviewer.

Shirley Black has joined *Field Research Corp.*, San Francisco, as a research director. Previously, she was vice president at the Research Spectrum. Also, **John Taggart** has joined FRC as systems/operations manager.

Stanley Arasim has joined Wilmington, DE-based *Franklin/Lake* as vice president of marketing research services. Previously, he was with ICI Americas.

Linda S. Hayes has joined *Thomas Dunker & Associates*, San Francisco, as project manager. Previously, she was a marketing research consultant at Addison Design Consultants, San Francisco.

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Maritz Marketing Research Inc. has opened a new office at 388 Market St., San Francisco, CA, 94111. Telephone 415-391-1606.

Thomas Dunker & Associates has moved to larger quarters at 1951 Webster Street, Suite 101, San Francisco, CA 94115. Telephone 415-346-1104.

BRX Inc. announces that it will be conducting business under a new name, BRX/Global, Inc., Marketing Research and Consulting.

Catherine Bryant & Associates has relocated to larger quarters at 6000 Market Square Court in Clemmons, NC. Telephone 919-766-8966.

Atlantic Marketing Research Company, Inc. recently opened its Connecticut office in the greater Hartford area, at

Northwest Certified Surveys/Gilmore Research has moved to 2324 Eastlake Avenue East, Suite 300, Seattle, WA, 98102. Telephone 206-726-5555.

SPSS Inc. has opened a sales office in the Washington, D.C. area at Twinbrook Metro Plaza, 12300 Twinbrook Pkwy., Suite 600, Rockville, MD, 20852.

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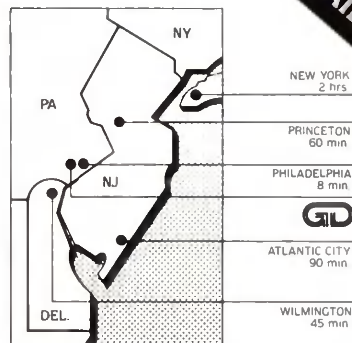
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Market area inspection tool

National Planning Data Corp. (NPD) announces the Prime-Location system, which links satellite aerial photographs with database capabilities to add a visual dimension to demographic analysis. The system combines interactive computerized street network databases (adopted from the U.S. Census Bureau's DIME and TIGER files), with high resolution satellite imagery, creating "overlays" that allow for manipulation of research data. For example, a user designing a marketing campaign can identify the locations of stores and customers by typing in an address or pointing to a section on the screen.

Prime-Location features: a user-friendly mouse interface; a wide array of support databases, including updated

demographic and boundary files for census tracts, ZIP codes, counties and cities; custom reporting; and integrated statistical analysis, charts, and mapping. For more information, contact NPD at 607-273-8208.

New version of mapping package

Strategic Locations Planning, Inc. (SLP) introduces a new version of its desktop mapping package with improved display, printing and analysis capabilities.

Atlas*Graphics 3.0 provides users with a variety of analysis features, including the ability to assign data values to points (e.g. store locations) and lines (e.g. roads). The ability to control the color, size, and type of a point or line on a map, based on its underlying data value, reflects a new trend in desktop mapping. This type of analysis lets the user compare the size or importance of one branch office to another, for example. Users can also assign a symbol to a data point representing the location of a customer, and link the size or color of the point to a database.

In analyzing traffic patterns, for example, Atlas can highlight segments of roads and highways to show usage, capacity and growth trends. City planners and transit officials can use this feature to

analyze shifts in population and road usage to determine their priorities and allocate resources accordingly.

Version 3.0 also now supports the 16-color Video Graphics Adapter. Previously the program supported only the Enhanced Graphics Adapter, Color Graphics Adapter, and Hercules Graphics Cards. For more information, contact SLP at 408-985-7400.

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Chiropractic

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and 148 respondents said it was safest to use, 50 more than the next closest technique.

Not only is the Activator instrument

and 44.)

Increased validation

Activator's rankings in the "scientific research" and "published paper" attributes showed a need for increased validation of the Activator method's effective-

tic and in scientifically documented research about chiropractic," Olsen says.

As a result, in 1987, Fuhr formed the National Institute of Chiropractic Research, a non-profit organization created specifically to increase the level of chiropractic research. Since then, he says, great strides have been made.

"It really spurred us on. We've had five published papers in blind, peer-reviewed indexed journals. We've got a major association with Arizona State University and the Harrington Arthritis Research Center."

Communication with students and faculty

The survey results also pointed out the need for increased publicity efforts, focusing on communication with the chiropractic college faculties, students, and practicing doctors about the Activator method and the scientific research studies.

To this end, Activator Methods replaced their 4-page quarterly newsletter with a 12-page, bimonthly publication called *Activator Update*. Fuhr began to publish the results of the survey in the newsletter to show chiropractors where the technique stood in the eyes of the profession.

"I think that did a great deal for us. It let people know where we were, and it gave (the chiropractors) the confidence to stay with (us) or join (us)."

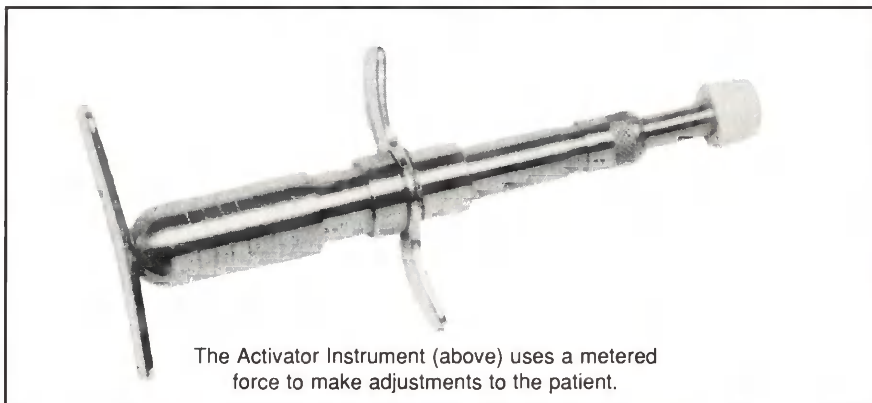
Another goal, Fuhr says, is to increase Activator Method's presence in the curricula of chiropractic colleges. Progress has already been made in this area, he says, noting that five years ago, only one college was teaching Activator as an elective, and now eight are doing so.

Further research

Now that the findings of the first study have been acted upon, another mail study similar to the first one is in the planning stages.

"We may change a few questions, but overall it will be very much the same," Olsen says. "We're going to see how much and in what areas the company's corporate image has changed, how effective the advertising, public relations, and direct mail have been."

"We're going to see if the perception has changed," Fuhr says. "What's our market share? Are we changing it? Is it static? How are we doing now?" MRR



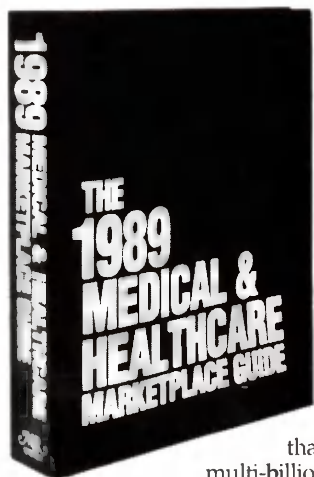
The Activator Instrument (above) uses a metered force to make adjustments to the patient.

safer for the patients, Fuhr says, it is also less taxing for chiropractors to use. Other methods require them to make adjustments manually by exerting tremendous pressure with their thumbs and hands, which can result in a chronic muscle fatigue that leaves many doctors worn out by the time they reach their 40s. (Indeed, 73% of the respondents to the mail survey were between the ages of 25

ness through publication of articles in recognized scientific and chiropractic journals.

This need for validation was applied to the profession as a whole, as the doctors expressed their desire for continued scientific research of all chiropractic treatments and their effects on patients.

"We found that the doctors were very interested in information about chiroprac-



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Nightclub

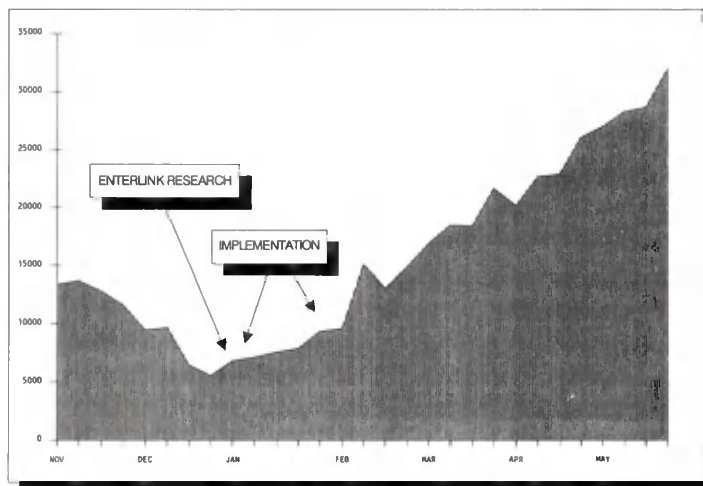
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brass curios, surrounded by light pine wood and touches of green. In the beginning, the club was advertised as "The den of your dreams" because of its plush, cozy surroundings—which went well with the more relaxed pace of happy hour but not with the more hectic late-night scene.

"We had tried to put something in that the market didn't want," Heitzenrader says. "David came in and changed it to what the market wanted. He said 'You need to be a dance club.'"

Using information obtained from the customer research and market analysis, the club has repositioned itself in the marketplace. Monthly sales figures have risen more than 250%.

"Our goal was to increase the happy hour business, the base that we already had, and bring in new people for late night, to let them know that it wasn't just a happy hour place, it was also an energetic, high-energy dance club that could be fun late night," Heitzenrader says.



(SPECIAL EVENTS DELETED)

Meeting that goal wasn't as difficult as it might have been because the biggest problem facing the club was a lack of awareness on the part of late night customers, rather than a negative image, which is a difficult obstacle for a club to overcome.

"The good news was, they hadn't alienated the market," Townsend says. "People hadn't come to the club and not liked the product and gone someplace

else. They just had never given it a try. Because of the name or the advertising or the image, the late night market just didn't think it was a place for them."

Conducting the customer survey

To get a representative sample of customers (frequent and infrequent, weeknight and weekend) and dayparts (happy hour, transition and late night), Townsend typically conducts the com-

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puter survey at least three successive nights, either Wednesday-Thursday-Friday or Thursday-Friday-Saturday.

At the door, cards redeemable for a free drink were handed out, explaining that a survey was being performed and inviting the patron to take part. Those that did were seated at a computer to take the 54-question survey.

At Horsefeathers, approximately 800 customers participated. Along with supplying ZIP code and other demographic information, customers answered questions about their perceptions of

Horsefeathers' food, music, service, and decor, their specific likes and dislikes about the club, their awareness of promotions, and how they initially found out about the club.

They also provided information on club-going habits: Why do they go out? How often do they go out? How much do they spend? What types of promotions do they enjoy most? What radio stations do they listen to and when? What is the most effective way of hearing about a club?

Similar questions were also asked in the focus groups. The responses were

broken down by age, sex, daypart preference and club-going frequency (for Horsefeathers and clubs in general).

Strengths and weaknesses

The customer research identified the club's strengths and weaknesses, according to its various customer segments, resulting in design and music format changes. It also aided redevelopment of the club's in-house, direct mail, and radio advertising.

A large percentage of frequent customers indicated that they went to Horsefeathers mainly to meet friends and relax after work, choosing to go elsewhere to dance. Some cited dissatisfaction with music selection and DJ performance. These findings were important because they indicated that if the right changes were made, these frequent customers would probably attend the club more often and stay longer.

Male respondents said they went to clubs primarily to meet new people, while a large percentage of females indicated that they went to clubs for dancing. This made it clear, Townsend says, how important the music, sound system, and light show were to Horsefeathers' female target market. Catering to this segment of the market is crucial, he says, because if a club can attract women, the men will follow.

Radio and direct mail

Overall, radio advertising and direct mail were cited as most the most effective promotional tools. Awareness of Horsefeathers' radio advertising was much higher than in most surveys Enterlink has done and the club's billboard campaign also proved effective.

32% of the respondents said they first heard about the club through word of mouth, which is about half of the typical response, Townsend says, indicating that either the club's radio, billboard and newspaper advertising had been extremely effective, or that the word of mouth was not very good. Townsend ventures that a combination of the two reasons is probably the most likely explanation.

Analyzing the research data, the promotion efforts of the club's competitors, and past Horsefeathers promotions re-

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sulted in a barrage of new in-house promotions, mail-outs, and flyers for events like the Monday night "Eats and Grins" comedy show, Ladies' Night on Wednesday featuring lobster on the buffet, and Thursday night alligator races. Other



Townsend

promotions to increase repeat business were also undertaken, such as Bounce Back cards, which are given out on a Saturday night, for example, entitling customers to reduced drink prices the following Wednesday.

Responsive to radio

The research showed that two important groups—females and 21 to 25 year-old customers—were most responsive to the club's radio ads. Coupled with the information supplied by customers in that age group on their radio station preferences and listening habits, the club was able to make its radio advertising hit the right audience.

"We were spread out through the market on the radio and weren't using one particular station, and that station came up as being most popular with the people we wanted, so we started to use it and it brought us success," Heitzenrader says.

One trap that nightclub management can fall into, Townsend says, is the belief that radio is the antidote for sluggish sales. Often they invest in a massive ad campaign when they should be taking a hard look at the concept behind the club.

"You can spend a lot of money on radio and get people to come down to the club," he says, "but if the product's not right, you're just throwing dollars away. In the surveys we do, asking people how they heard about a club, the majority of the people say 'word of mouth.' Less than 10% say the radio. But what the radio can

do is start the word of mouth up. If somebody hears about lobsters on the buffet at happy hour, for example, they're probably going to talk about that at work. Radio is necessary, but it's definitely not the cure-all, especially in the club business."

Once they felt they "had the product right," the club took a new approach to the content of the radio ads. Previously, the spots had focused on upcoming promotions, but more recent spots have emphasized the music, to show that Horsefeathers is a place for people who love to dance.

"Hot Mix"

This idea was further conveyed by a promotion called the Hot Mix, which began this spring. From 10 p.m. to 2 a.m. every Saturday night, radio station WDJX broadcasts four hours of uninterrupted dance music live from the club with no advertising, except for occasional voice-overs on upcoming club promotions. Sales doubled on the first night and the promotion continues to do well.

In addition to enticing people to the club, Townsend says, the Hot Mix has helped reposition the club in the eyes and

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ears of the market. Hearing the Hot Mix, even those who don't go to the club get a definite idea of what kind of a place Horsefeathers is—and isn't.

"One of the problems we had with Horsefeathers was the club's name," Townsend says. "Some people in the market thought it was a country-western place. By hearing the radio show, they know immediately that we don't play country and western music!"

Townsend says that along with increasing club sales in the other markets he's worked in, the Hot Mix concept frequently brings the radio station's ratings up, because the show is something new and

different, and it gives those under the drinking age a chance to hear non-stop dance music.

"Radio stations also like it because it's tough to sell air time between 10 p.m. and 2 a.m. on a Saturday night, and if they've got a client that's going to buy it every Saturday for three months, they get pretty interested."

It also has another benefit: it locks out the competition from advertising on that station during that time period.

"They can't run ads, so if somebody is driving around looking for a place to go, all they're going to hear about is our club, they won't hear about any of the competi-

tors."

Design changes

In response to customer comments and also to accommodate increased late-night business, design changes were made to maintain the comfort level of happy hour while adding space for dancing.

Stand-up drink rails were installed in the front of the club to alleviate a problem caused by people congregating near the dance floor, which is located near the back of the club.

"If you walked in the front door, even if there were a hundred people there you wouldn't see any of them," Townsend says. "It looked like the place was dead. People would walk in, look around and walk out. So by putting the rails in the front, we now have people in the front of the club interacting, so when you walk in now you see some people."

Employee survey

Townsend also conducted computerized interviews and focus groups with employees, because he believes that if the staff is happy and enthusiastic, and they can communicate that feeling to customers, it can do a great deal towards giving the club a positive feel and ensuring a lengthy lifespan.

"The key to longevity is having a great staff that's really involved in promotions and marketing and can make the place feel different and be different, without repainting, changing the name, or moving the dance floor. Every club that I've ever seen that had a long life had this—employees that were involved, that knew their customers and would tell them about upcoming promotions, and really get the customers excited about coming to the place."

The employees were asked what they liked most/least about their jobs, what their level of job satisfaction was, and how they rated relations with management. While most employees were happy, some cited a need for increased communication with management, adding that they felt their ideas on promotions and service were being overlooked.

"Party Squad"

To increase management/employee communication and give employees a stake in the club's success, Townsend introduced what he calls the Party Squad, a small group of creative-minded employ-

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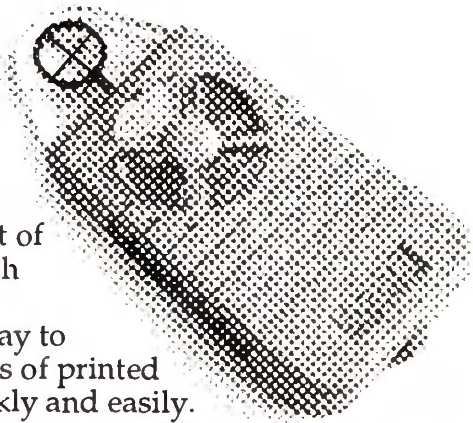
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ees who are shown basic brainstorming techniques, given a budget, and then put in charge of organizing a promotion from start to finish. Managers are also involved, but it is a group decision-making process; a manager has no more say than a bartender.

In addition, the group is given 10% of any increase in sales to do with as they see fit. They can divide it up among the employees, for example, or put into an employee party fund. Not only does the Party Squad concept totally involve the employees, Townsend says, but because they create and implement the promotion, it gives them a strong sense of ownership of the promotion and a real interest in its success.

"Employees have to feel like they're a part of the place and that they make a difference," Heitzenrader says. "Our people work real hard but they have a great time. A lot of them were here when it wasn't a very successful club, and to see it turn around and know they were a part of it is great."

Another reason this concept can be successful, Townsend says, is that employees are often of the same age and income levels as the target customer, so they have insight into what promotions their peers might find fun and exciting.

Aggressive approach

Heitzenrader says that the employees and management have responded to Townsend's aggressive approach to promotions.

"His philosophy is that you need to have at least one promotion a week that lets you own that night in your city. Because of the Hot Mix, we own Saturday night now without a doubt—we've got a line until 2 o'clock in the morning. We've taken that philosophy and gotten very aggressive with it and said 'We want to own two or three nights a week.' And right now we own two nights for sure, and there is a third that (gives us) as heavy a market share as anyone else."

Heitzenrader credits careful planning, based on analysis of the research results

and cooperation between Townsend, the employees and management for the club's resurgence.

"We're where we are right now because we created a marketing plan with realistic time frames and executed it very well. I think one of the problems with the club before was that plans weren't made far enough ahead of time to make things happen."

The research confirmed feelings that staff and management already had about the direction the club should take, he says. "But until it comes out on a piece of paper, you're just not sure." **MRR**

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continued from p. 18

from the importance of exercise to the value of planning leisure activities ahead of time instead of fitting them in when you can.

"It is important to counterattack stress with pre-planned weekend breaks," Hanson says. "We must all learn how to balance the demands of work and home between the week and the weekend. And when we can no longer tolerate stress, we must be able to escape for a fun and relaxing diversion."

Here is a break down by age group of how Americans spend their weekends:

Ages 18-24

Typically this group spends almost 14 1/2 hours with friends, exercising, going to entertainment events and pursuing hobbies and interests. Those in the 18-24 range say they have more energy than any other age group at the end of the work week, but they report feeling less energetic after the weekend.

"This group works hard and plays hard—they spend more weekend time on both leisure activities and chores than

any other age category and spend fewer hours on real relaxation and sleep," Hanson says.

Ages 25-34

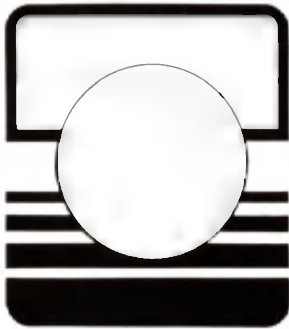
This group spends 12 1/2 hours doing chores on the weekend, spending 6 of those hours cleaning, running errands and cooking—more than any other group.

Ages 35-49

More time is spent in this group grocery shopping, paying bills and doing laundry.

Ages 50+

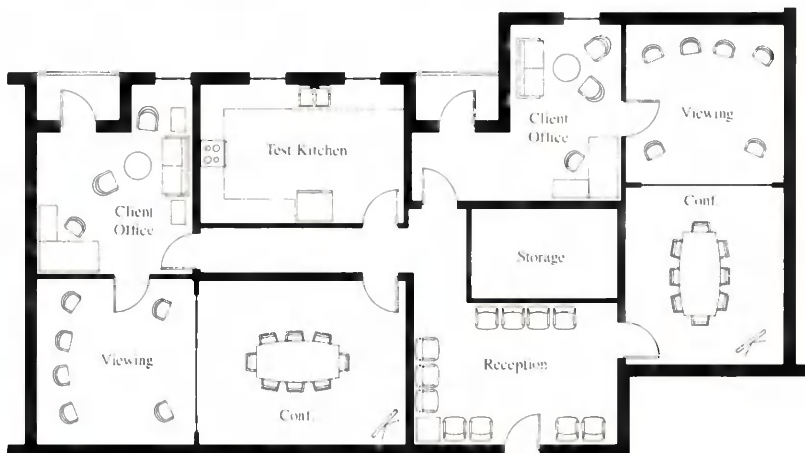
This group spends almost 7 1/2 hours relaxing by visiting friends, reading, and



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"We must all learn how to balance the demands of work and home between the week and the weekend. And when we can no longer tolerate stress, we must be able to escape for a fun and relaxing diversion."

Peter G. Hanson

pursuing hobbies. Working at their job and cleaning are the two tasks that take up the most weekend time for them.

And, the research shows, your definition of a chore can change depending on your age group. For example, many of those in the 18 to 24 age group consider gardening and cooking to be chores, while these same tasks are viewed as relaxing hobbies by those in the 50+ age group.

21 percent of the men said they felt very energetic at the end of the work week, while on 11 percent of the women felt this way. But at the end of the weekend, 18 percent of women reported they felt more rested, as compared to 17 percent of the men.

The survey showed that women spend 2 1/2 hours more on chores each weekend than men.

Single men report having the most energy left on Friday night, but they also report being the most exhausted by the end of the weekend. They spend more

time than any other group pursuing their interests—exercise, entertainment, careers—and less time doing chores. Among all the groups, single men do the least amount of housework.

"It's unbelievable. It's already exceeded our projections. We've nearly met our initial forecast for the entire year of what this program might deliver to us, and we're only a little over halfway through it. It re-verifies one thing: pay attention to research."

Robert E. Dirks

"The only thing they don't seem to catch up on is R&R," says Hanson.

Over 65% of parents want to get away for the weekend. They would also like to spend more time on the weekend with their children, but they say that family obligations, time commitments, and cost prevent them from vacationing more often

with their children.

Parents report averaging almost six hours per weekend playing with their kids. 92% of these parents consider this a relaxing and enjoyable activity, and would spend two more weekend hours doing it if they had a chance.

People with children spend 66 percent more weekend time cleaning, 43 percent more time cooking, and 52% more time doing laundry than those without children. Married women do the most chores of all the groups surveyed, up to 30 percent more than single women.

Exceeded projections

The program has been very successful. Comparing the BounceBack Weekend results thus far to those from a program the company ran last year, Dirks says, the company is 96% ahead in reservations.

"It's unbelievable. It's already exceeded our projections. We've nearly met our initial forecast for the entire year of what this program might deliver to us, and we're only a little over halfway through it. It re-verifies one thing: pay attention to research." MRR

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Names of Note

continued from p. 21

Ardith (Art) Rivel has joined *Christensen & Associates*, Scottsdale, AZ, as a senior vice president. Previously, he was senior vice president for Yankelovich Clancy Shulman.

Patrick M. Baldasare, president and CEO of *The Response Center*, Philadelphia, has been named Entrepreneur of the Year in the Service Sector by the Philadelphia Commercial Development Corporation.



Baldasare



Glazier

John Glazier has been named senior account manager at the new San Francisco office of *Maritz Marketing Research*. Previously, he was director of sales and marketing with Sales Resources Co.

Sharon Lewis has joined *Wolf/Altschull/Callahan Inc.*, New York City, as a project director. Previously, she was an analyst at Shifrin Research.

Steve Seidmon has joined *Decision Research Corp.*, the market research

division of Temple, Barker & Sloane, Inc. Lexington, MA, as research consultant and director of DRC's Entertainment Division. Previously, he was vice president for research at MTV Networks.

Doran J. Levy, Ph.D., has joined Minneapolis-based *Strategic Directions Group, Inc.* as executive vice president. Previously, he was president of Market Structure Research, Inc.

Michael A. Hardin has been promoted to senior vice president-general manager for *Etrick and Lavidge, Inc.* the marketing research company of Equifax Inc. In addition, **Raymond N. Beard**, **Larry G. Gulledge**, and **Roger L. Bacik** have been promoted to senior vice president.

Nielsen Marketing Research, Chicago, has promoted to following: **Michael Spindler** to vice president, national client sales and service; **Ed Case** to vice president-director of retailer services. In addition, **Tom Richardson** has joined Nielsen as vice president-manager of retail information applications. Previously, he was with Jewel Foods and Super Valu. **Wayne Levy** has joined as vice president-director of product development.

Nielsen also announces the promotion of **George Ackerson**, formerly Nielsen client services manager, to executive vice president, national sales, for *Logistics Data Systems*, a company acquired by Nielsen in December of 1988.

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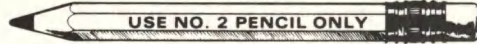
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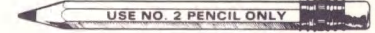
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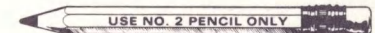
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Mail surveys still a viable research technique

by Tom Quirk

My first experiences in questionnaire writing took place in the 1960's when, as director of research at Miller Publishing Co., I had the responsibility for providing research for 18 trade publications. At that time WATS service was not available and our audiences were too scattered to use local field services for local telephone or personal interviewing services. It was necessary for us to rely on mail surveys for most of our primary data collection.

At the time, we were conducting more than 50 surveys annually, ranging in size from double postcards to multi-page documents. Although we had considerable lead time for most of them, there were a number which were sent out within a day or two after the decision had been made that they were needed.

Although there has been less emphasis placed on the use of mail surveys, they nevertheless are an important part of the research mix and are often the most effective and efficient method of obtaining data. Based on my experience I believe there are certain aspects of this type of research which require special attention.

The most persistent criticisms of mail survey techniques related to the non-respondent bias factor. It seemed that whenever the results of a study using this technique were presented, the first question asked related to the response rate. Even those who had no knowledge or direct experience with research believed there was some specific response percentage which legitimized the results. It was a number which had been given to them from "on high" and had to be equaled or exceeded in order for the results to be valid. It is the type of question which is rarely asked when the results are obtained using other techniques.

Those who have the responsibility of presenting research findings do not want to get bogged down in controversy regarding the validity of the results. There are a number of ways which response rates can be enhanced to the point that this question becomes moot. Each involves careful list selection. The re-

searcher must know as much as possible about the list which he or she is using. It will have as much to do with questionnaire development as with delivery rates.

The most obvious questions relating to any list involve deliverability. It is critical that the list be current and that the provider of the list make a sampling available for testing. Some list

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houses promise a 95-plus percent delivery rate, but this is not sufficient because in the mail rooms of many companies, mail addressed to individuals no longer employed is simply discarded.

Other areas of consideration regarding lists include:

1. *The updating of the list.* The high mobility of our population makes it imperative that any list used be updated frequently.

2. *The breakdown of categories in the list.* The more information available about the people on a list, the easier it will be to target your mailing.

3. *The availability of special programs.* These allow custom selections by state, ZIP code, random selection, etc.

Specific information regarding the types of individuals on the list is important for the development of the questionnaire. If one is to achieve a high response rate it is important that each of the respondents find that the survey applies to himself or herself. Every individual receiving the survey should see questions which are directly applicable to them. We want everyone to get into the questionnaire and feel that it was designed for them. If the researcher does not do this then it is possible that the response rate will be adversely affected and that the non-respondents will be different than the respondents. Projecting the results to the entire universe may not be valid in that situation.

One example of this problem which I recall occurred when an editor of one of our publications, *Feedlot Management*, decided to conduct his own editorial survey on the use of horses in cattle feedlots. It was a postcard-sized questionnaire with three ques-

tions:

- 1) Do the individuals have horses for use in their feedlot?
- 2) How many?
- 3) How are they used?

Over 80% of the respondents indicated they were using horses in conjunction with their cattle feedlot operations. The editor was excited because he believed that he had discovered something concerning this type of operation which had been previously mentioned in articles relating to management practices. He was ready to report the results at the time our research department became aware of his survey. We were asked to review the data.

First, we found the response rate to have been less than 10%. We also discovered problems with the sampling technique. We were able to convince the editor that he should delay reporting the results until we had done a follow-up survey to determine if the initial results were valid.

Our questionnaire was approximately one page in length. We started with some general questions which would be applicable to all cattle feedlot managers. After asking for this information the questions relating to horses were presented. The survey ended with open-ended questions concerning editorial interests. The survey was mailed to a properly selected sample of the circulation.

The response rate for our questionnaire exceeded 50%. Less than 10% of our respondents indicated ownership of horses as compared to the 80+% in the earlier survey. The initial survey had elicited responses primarily from those who saw the questionnaire as being applicable to them. By providing a questionnaire which was much more inclusive, the results were dramatically changed.

There were many advantages to learning the questionnaire writing process as I did. Preparation is more critical because once the commitment is made regarding the questionnaire and the sample, it is difficult to correct errors. Although custom-mail questionnaires have declined in importance they can still be valuable data collection tools when used properly. MRR

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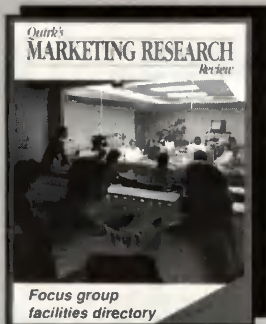
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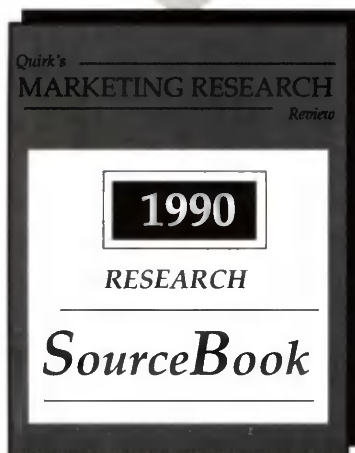


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Trade News

continued from p. 20

Americans are favorably impressed by the quality of German and Japanese products; in fact, more Americans rate these countries' products as superior in quality than do so for American goods.

A further reflection for the high regard

for Japanese products is that Japan is seen as being unfairly blamed for America's economic problems by much of the American public.

The more upscale segments of the U.S. population have a particularly favorable impression of German and Japanese goods. College-educated consumers, and those with annual incomes of \$50,000 or

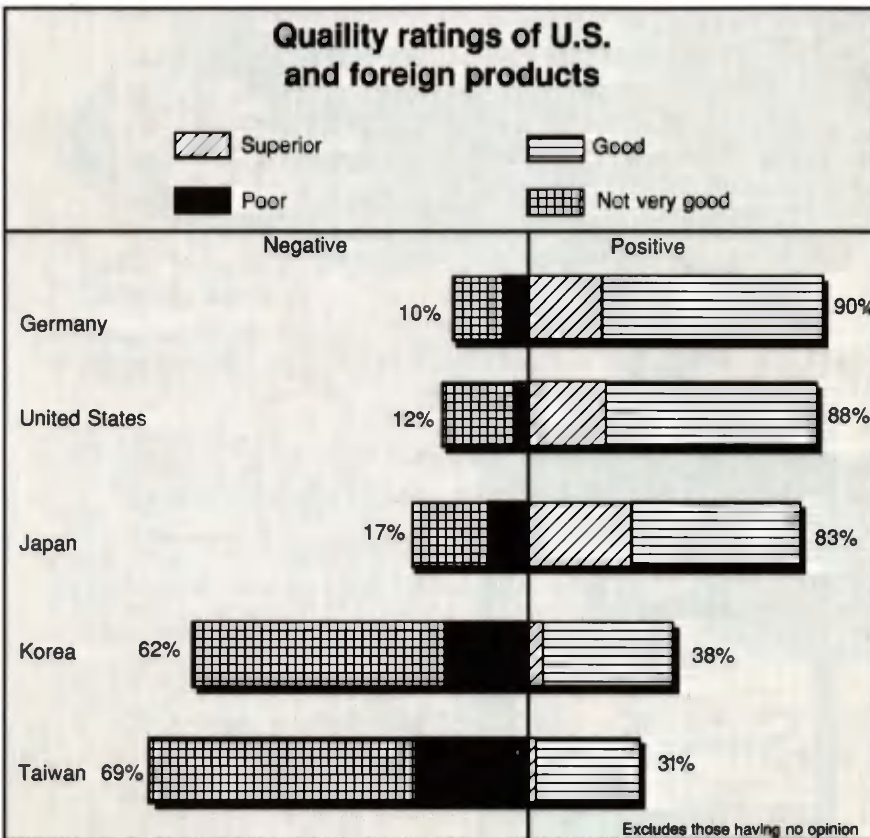
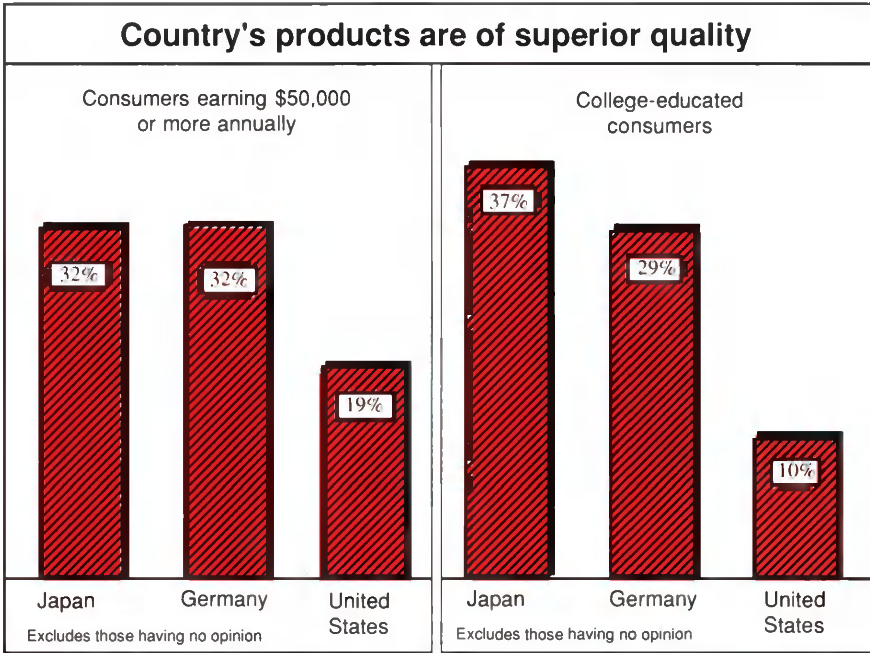
more, are much more likely to believe that the products of Germany and Japan are of superior quality than they are to bestow the same laurels on American manufacturers. About one third of upper-income consumers designate German and Japanese products as superior in quality, only one-fifth believe U.S. goods to be in the same class. Among college-educated Americans, the results are even less favorable for U.S. manufacturers: German and Japanese products are deemed to be of superior quality by 29% and 37%, respectively. U.S. products are rated this highly by only one college graduate out of ten.

Among American consumers overall, the preference for foreign products is less pronounced than among the more affluent segment of the public; nevertheless, Japanese (25%) and German (21%) products do rank ahead of American goods (20%) in terms of ratings for superior quality.

Korean and Taiwanese products continue to suffer from an image of cheapness and shoddy quality. Virtually no one rates the goods of these countries as being of generally superior quality, while more than half rate their quality as not very good or poor.

The praise that Americans lavish on Japanese products may help to explain one aspect of the U.S. public's attitude towards trade with Japan. A majority of Americans (54%) believe there is truth in the statement that the U.S. is blaming Japan for its own economic problems. At the same time, there is a large proportion (42%) who accept the idea that Japanese companies are competing unfairly.

Americans' opinions on this issue are divided along generational lines. The belief that Japanese companies are competing unfairly with their American counterparts is held by 48% of people aged 60 or older, compared to 35% of the under 30 age group. While 40% of senior Americans believe that Japan is being blamed unfairly for the United States' own economic problems, about two-thirds (63%) of young Americans believe Japan is a scapegoat for America's economic woes. MRR



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Corrections

The facilities below were inadvertently omitted from the 1989 Telephone Interviewing Facilities Directory:

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Fax 412-471-8497
30 20 30 30

MarketWise, Inc.
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Charlotte, NC 28202
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Fax 704-332-0499
10 0 10 0

Research Interviewing Center
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Akron, OH 44328
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32 32 32 0

In Touch Research, Inc.
1710 Highway 6 So., Ste. D.
Houston, TX 77077
Ph. 713-497-2828
Fax 713-497-4059
16 0 16 16

In addition, please note the change in the following listing from the the 1989 Telephone Interviewing Facilities Directory:

New Directions Marketing Research, Winter Park, Fla., has a new fax number: 407-740-7575.

Trade Talk

continued from p. 46

making it too verbal, you also risk getting wrong answers, because you're asking the respondent to diagnose his behavior himself. The Greeks already knew that the most difficult job is to know one's self."

He cites an example from one of his early studies for Chrysler Corp. Based on interviews it had conducted, the car maker was convinced that men made the car buying decision. But when the company began to question the research findings, it consulted Dichter. Instead of asking the respondents to tell him who made the decision, Dichter asked each one to describe exactly what had happened when they bought their last car.

"A typical answer was 'We got into our old car, we went from one dealer to another, we compared trade-in allowances, we took a test drive and we bought the car.' And I would stop them and ask 'How come you're saying 'we' all the time? I thought you made the decision. And they would say 'Oh, I forgot, my wife was along.'"

Based on this, Dichter recommended that Chrysler address their advertising more prominently to women. It did, and sales took off.

"It is the motivational researcher's job to uncover the 'why,' because we don't even know why ourselves, and if we did we would probably repress it," he says.

He expected repression of a different sort to hinder the Soviet consumer interviews, but though some respondents were initially hesitant to participate because of fear of government surveillance, most spoke freely.

Dichter and his colleagues had a list of possible participants for the research, but they also depended upon word of mouth to gather subjects, asking participants to recommend people who might be willing to take the survey. It wasn't a strictly scientific approach, but given the political climate, the enormity of the country, and a host of cultural and bureaucratic barriers, he says, it was difficult to apply the same sampling standards used for a Western-style public opinion survey.

The interviews typically lasted about 30 minutes, depending on each respondent's level of talkativeness. To familiarize the Soviet interviewers with his style of questioning, Dichter brought with him an interviewing guide already translated into Russian.

"I'm more inclined to conduct the interviews in a free rambling way. We use a guide instructing the interviewer to lead the conversation but not to interfere. When the respondent gets off the subject we don't stop him, because often you get the most valuable information from these asides."

The most surprising findings came in the area of the Soviets' perception of advertising, particularly Western advertising, and the existence of brand consciousness.

"I expected that they would be rather hostile vis-a-vis western advertising, calling it frivolous and so on, but we found a great deal of admiration for it. They said it was sort of a glimpse into heaven, a door half open. They said 'There are all these things, we wish we could get them.' It's a very fertile ground for modern advertising."

Those interviewed had very few criteria to determine the quality of a product, Dichter says. Some brand names were well-known, and frequently, a product's perceived quality was dictated by its country of origin. Tests were performed placing labels which said, for example, "Made in Switzerland," "Made in USA," "Made in USSR," or "Made in Germany," beneath various products. While the study isn't finished yet, Dichter says, "Made in USA" had a very high preference, while "Made in USSR" didn't.

Though this type of test yielded clear-cut answers, Dichter also used a number of projective tests, similar to a Rorschach test, where respondents were required to project themselves into a situation by explaining what was happening in a picture. For example, one image featured a sun half visible over the horizon. The respondent was asked: Is it rising or setting? Which country is it in?

"That's a better way of asking 'What are you satisfied or dissatisfied with in your communist country?'"

The use of this kind of open-ended question put him at odds with a member of the Soviet sociological institute that assisted during the interviewing.

"We use a lot of open-ended questions in motivational research to get free flow of associations from the people. He didn't understand this because he only knew about quantitative research. He wanted yes and no answers. He finally came around, but he kept wondering about the picture of the sun on the horizon, asking 'How can you tabulate responses to it?'"

Along with occasional professional difficulties, Dichter also experienced cultural problems. Upon arrival in Moscow, it took him two hours to check in to his hotel, despite having reservations and paying the necessary bribe. The hotel was miserable, he says, a huge Pentagon-like fortress with seven guarded entrances.

He speaks of corrupt taxi drivers who tell you to get out of their cab if you question the steepness of their flat fare rate. They are part of an underclass, he says, who survive by illegal means, by, as the Russians say, "Doing things the left way." For example, a chauffeur for a top government official will run side trips to make extra money while waiting for his passenger to return, or he will siphon gas from the car and sell it.

Dichter says he thinks the Soviets are hopeful that Gorbachev will be their salvation, but some are not convinced he will last. "The reaction commonly was 'What good is *perestroika* if we still can't buy the things we need?'"

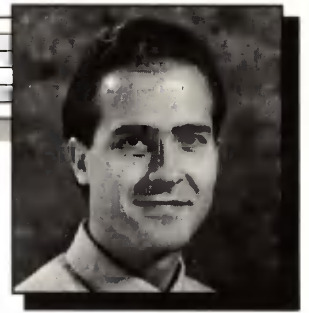
Gorbachev's changes also apparently haven't quelled Soviet interest in America. Dichter's hotel room was broken into, but instead of taking money, the burglars made off with several interior photos of an American supermarket which Dichter had brought with him.

"I went to a supermarket near my office and took photographs so that I could show them (to people in the USSR), and before I could do that, they were stolen!"

Though some Soviets have decided to stick it out and wait for things to improve under Gorbachev, Dichter says nearly everyone he spoke with wanted to know if he could help them get to America. "That always came at the end of the discussion," he says. "They would always say 'By the way...'"

MRR

by Joseph Rydholm
managing editor



Uncovering the soul of the Soviet consumer

Conducting consumer research in America presents its own set of difficulties, such as time constraints, budget concerns, and getting the right information from the right people. But imagine trying to do research in the Soviet Union, where until very recently capitalism was officially considered a dirty word and where “shopping” is little more than extended waits in several lines.

These were just some of the obstacles faced by Dr. Ernest Di-

chter, a pioneer in the field of motivational research, when he visited the Soviet Union this spring to investigate Soviet citizens' reactions to consumer goods and advertising, to uncover, as he puts it, “the soul of the Soviet consumer.” It was one of the first of what will undoubtedly be many journeys into Soviet research as the U.S.S.R.'s nascent capitalism blossoms under Mikhail Gorbachev's *perestroika*.

Dichter was asked to do the research as part of a joint venture between an Austrian communications company, M D Enterprises, and a Soviet publishing company, Vneshtorgizdat.

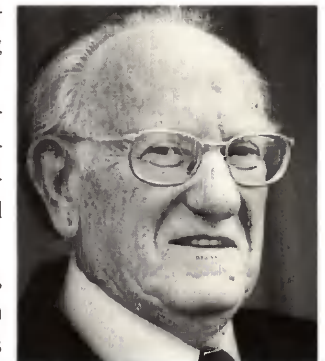
“MD hit on the idea of establishing a center in Moscow to facilitate East-West trade,” Dichter says. “They called and asked if I'd like to be a consultant.”

Born and educated in Vienna, Dichter emigrated to the U.S. in 1938 and began conducting his psychological research in marketing and communication. Over 50 years and 6500 studies later,

he has established himself as an expert in motivational research. In addition to guiding his company, Ernest Dichter Motivations, Inc.—which is headquartered in Peekskill, New York, with branches around the world—he is professor of marketing at the Westchester Campus of Long Island University.

The work of a motivational researcher is devoted to uncovering the hidden reasons why consumers make decisions—reasons hidden especially to the consumers themselves. It is a difficult task, Dichter says, because to get at the “truth,” you must ask the right questions in the right manner.

“When you want to know why, you run a number of risks,” he says, “because by asking people for the reasons behind their actions, you can get erroneous, rationalized answers. And by



Dichter

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continued on p. 45

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2. **Outstanding!** Will recommend for the entire professional staff at Ford. Extremely helpful for doing my job. Excellent, well laid out (manual).

Project Manager, Ford

3. **Fabulous** seminar. Covered a wide range of difficult information in only three days. I felt a very personalized learning experience — all due to the (speakers) vibrant, one-on-one communication style.

President, Marketing Consulting Company

4. **Excellent** — Covered more information in more detail and certainly more immediately useful methodology than the two semesters of business research methodology that I had just completed in an MBA program. Exciting, energetic, knowledgeable and effective presentation.

Opportunity Analyst, Dow Chemical

5. **Fantastic!** Even though I have an M.S. in stats, I have never had such a clear picture of how to apply stat techniques before. Wonderful examples to explain the theories, ideas, philosophies — superb (speaker!) Helped to motivate me to expand my use of different techniques and explore more possibilities.

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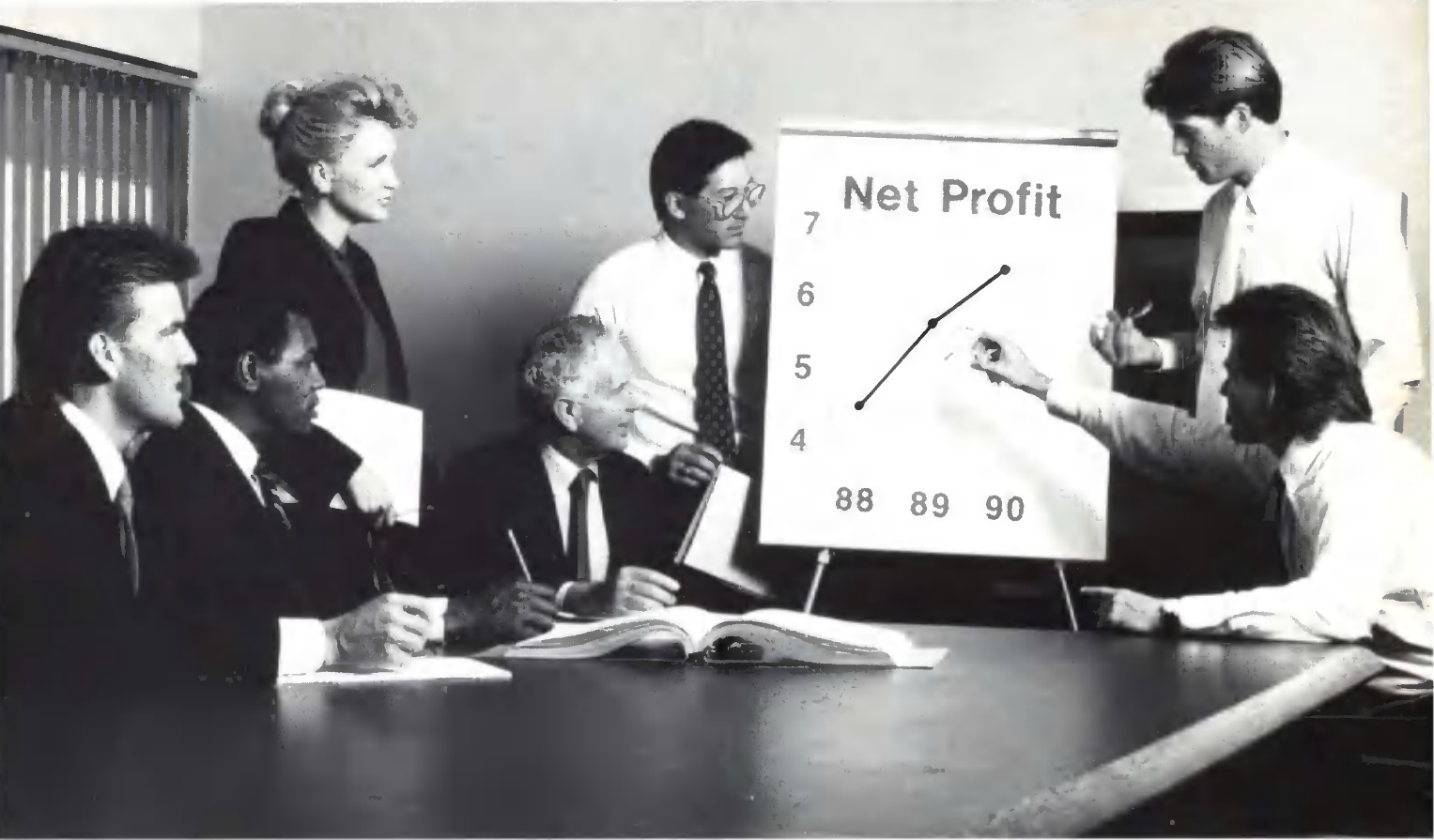
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Boston May 2–3
New York July 18–19
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 - 4. Questionnaire Design: Applications and Enhancements**
Chicago April 6–7
New York July 20–21
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 - 5. Computer-Assisted Questionnaire Design & Data Collection**
Cincinnati Sept. 22
 - 6. Focus Groups: An Introduction**
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 - 7. Focus Group Moderator Training**
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Cincinnati July 11–14
Cincinnati Aug. 8–11
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 - 8. Writing Actionable Marketing Research Reports**
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 - 9. Effective Oral Presentation of Marketing Information**
Cincinnati June 7–9
Cincinnati Oct. 2–4
 - 10. Managing Marketing Research**
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Cincinnati Oct. 2–3
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