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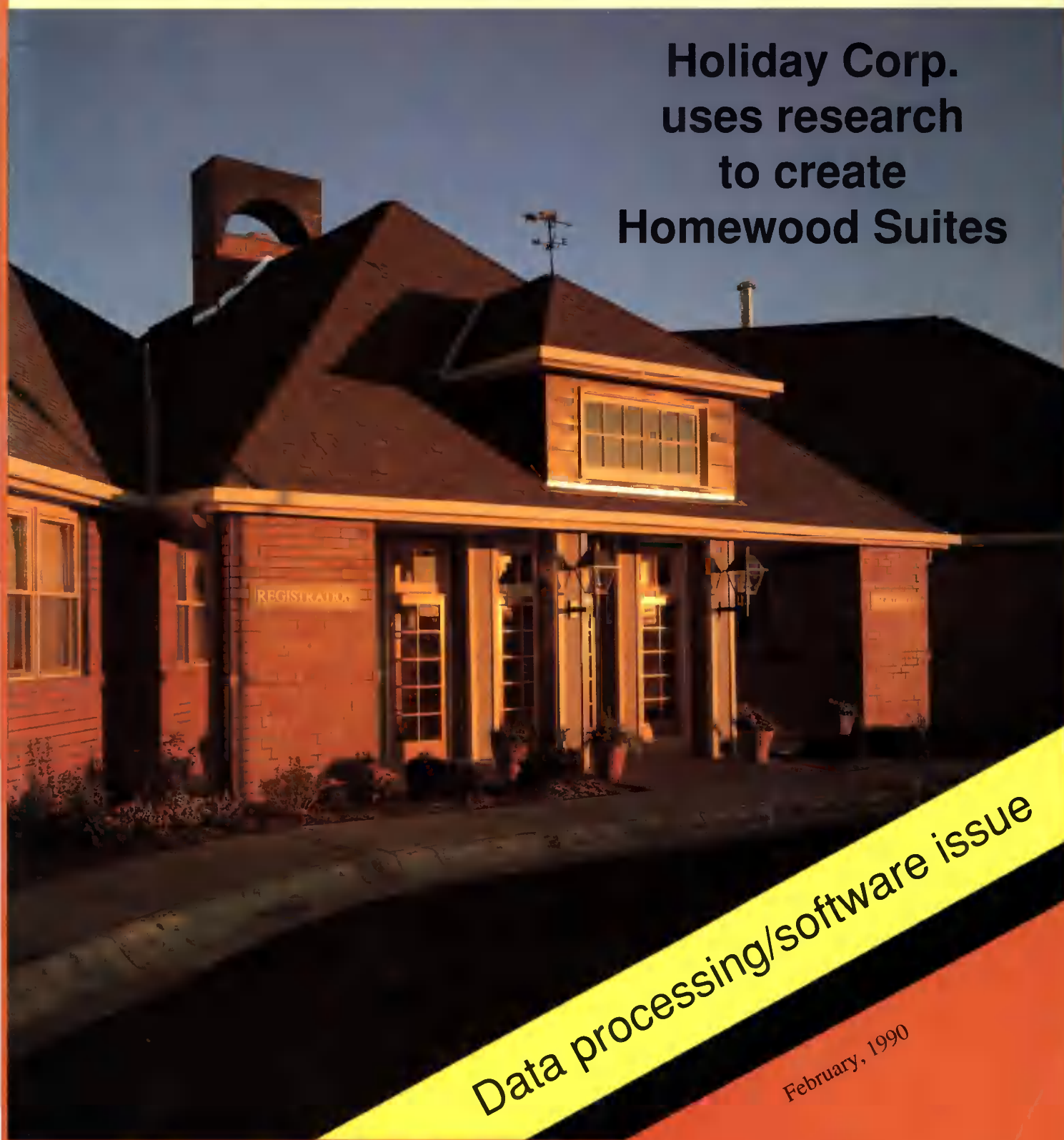# MARKETING RESEARCH
Review

Holiday Corp. uses research to create Homewood Suites

Data processing/software issue

February, 1990

Quirk's
MARKETING RESEARCH
Review

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Cover

Holiday Corp. used research to shape its all-suite lodging concept for business travelers. Photo courtesy of Holiday Corp.

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Someplace like home

Research guides Holiday Corp.'s creation of a lodging chain for business travelers

by Joseph Rydholm / managing editor

I n 1987, when Holiday Corporation ended its partnership in the Residence Inn hotel chain, it looked like the end of Holiday's involvement in the business traveler/extended stay lodging market. But it was only the beginning.

Soon after it sold its half interest in the all-suite chain as part of a recapitalization (Residence Inn was later purchased by Marriott Corp.), the lodging giant began developing Homewood Suites, its own concept for the all-suite/extended stay market—a niche which grew considerably in the latter half of the 1980's as the industry began responding to increasing market segmentation.

"We knew that the market was segmenting as early as 1978, and that Holiday Inn—although it was a product that was quite broad in scope—was clearly in the middle of the market. There were limits as to how far you could stretch it up or down, so we were looking for concepts that would round off our product offering at the high end and at the low end," says Bala Subramanian, director of market research, Holiday Corp.

Those needs were met by the introduction (in 1984) of the Embassy Suites line, an upscale all-suites product catering to business as well as vacation/pleasure travelers, and (also in 1984) the Hampton Inn line, a limited service economy chain positioned slightly below Holiday Inn. Then, in 1989, came Homewood Suites.

"We had the Residence Inn experience under our belt and we knew that the market existed. We wanted to come up with something that was different and, if possible, better than Residence Inn. We wanted to do it fast, and we wanted to make sure that the product was designed to appeal to key customer targets."

Specialized lodging needs

Using extensive research, Holiday designed Homewood Suites to meet the specialized lodging needs of extended stay business travelers such as consultants, salespeople, managers, auditors, those going through job relocation, and others attending training programs, seminars, or on field assignments.

The suites are designed with a long-term stay in mind. Cozy and functional, they provide plenty of space to work and relax in. Many feature wood-burning fireplaces, and in addition to a well-appointed living room and separate bedroom, all have a full-sized sleeper sofa, two remote controlled color TVs, and a kitchen stocked with a microwave oven, a refrigerator with an ice-maker, a dishwasher, coffee maker, and a wide array of pots, pans, dishes and flatware.

"Most of these people are traveling for their companies or businesses. They're affluent enough to require quality lodging; they want some comfort and quality and they're willing to pay for it. Recognizing that they're on a business trip for an extended period of time, we found that they need a home-like atmosphere, which

is what sets this hotel concept apart from a traditional hotel. That's why we decided on a name like Homewood Suites."

As a springboard for determining the elements necessary to create that home-like atmosphere, Holiday used the services of HTI Custom Research, a division of The NPD Group.

Holiday maintains proprietary ownership of a tracking system it calls The Lodger Panel. The system uses Insta-Vue, HTI's monthly mail omnibus which is sent to large samples of the HTI Consumer Panel (a pool of 225,000 pre-recruited households). The Lodger Panel survey collects information on the travel habits of 10,000 households each month. HTI then codes and tabulates the data and stores it on a mainframe computer. Holiday connects with the mainframe via telephone and, using HTI's on-line data analysis software package called PRE-

Holiday Corp. found that business travelers sought comfortable and functional accomodations that let them relax when they wanted to and work when they needed to. Hence, the rooms in a Homewood Suites hotel combine amenities such as a home-like living area--some complete with wood-burning fireplace (top)--with a well-lit work space that has extra phone lines for use of a computer and modem (bottom).

Some respondents said they liked to meet with clients in their rooms, and that it was important to keep the clutter of the bedroom out of sight, so each suite was designed with separate bedroom and living areas.

VIEW, performs its own tabulations from its office PC.

"We buy two cells a month from (HTI) and they mail questionnaires on our behalf to 10,000 individuals, asking them about every hotel stay they've experienced in the past 3 months. This has been done for several years."

Over time, Subramanian says, the Lodger Panel allows Holiday to accumulate many observations about people with a wide range of lodging experiences, keeping the company in touch with trends in the industry.

"We used the Lodger Panel to determine a lot of the critical answers that we were looking for. For example, what's the size of the market? What has its growth been? What customer targets are the most lucrative?"

Follow-up surveys

Using the contacts identified through the Lodger Panel, Holiday performed several research projects, including focus groups and follow-up telephone and mail surveys with panelists, to find out what features Homewood Suites should have to meet the specific needs of the target market. For example, respondents were asked about the lodging-related aspects that were important to them on business trips, and asked to provide examples of instances where their needs were met and where they weren't.

"One of the beauties of panel research is that we could screen potential customers from the panel who had exhibited extended stay behavior in the past few months, people in the upper income group who have purchased lodging and who

have paid more than $65 (per night) and have stayed longer than five nights. We were able to get a thousand names of people who did that. We were then able to survey some of them to ask about various aspects of the product and determine exactly what the product composition should be.

"If you were designing a study that you wanted to administer to a group like that, and you were starting cold by making random phone calls, it would take you forever to get a thousand names. And even if you did that, it would be very difficult to get a national representation. Having the panel was a boon in that we were able to do it fast and do it at a fairly reasonable cost."

Concept tests

To gauge the popularity of two concepts—one was a fully loaded version of the suites with a host of extras, the other was a more stripped down model, concept tests were conducted with respondents pulled from the Lodger Panel.

A brochure describing each concept, with floorplans, schematics and a brief write-up, was sent to over 300 Lodger Panelists who indicated they had recently made long-term and short-term hotel stays. A week or so later, they were recontacted by telephone to participate in an in-depth interview.

As expected, the participants favored a

version of the suites somewhere between the two extremes. "We got enough feedback based on that to take those two concepts apart and build one that seemed to fit," Subramanian says.

Wide variety

Holiday's research uncovered a wide variety of business traveler needs. For example, many said they wanted their suite to be a functioning office, with a large desk or work surface in a well-lighted space. ("Spreading blueprints across a king-sized bed isn't great on the back!" Subramanian says.) They also wanted computer jacks and multiple phone jacks so that a modem could be used without tying up phone lines, and the telephones had to have long cords for ease of mobility around the room.

The furniture had to be comfortable, especially the chairs. "We kept hearing in the research, 'Hotel chairs are awful to sit on and work from.'"

The suites had to be open and spacious, and designed so that the bedroom was separate from the main living area. "Some of them told us they liked to meet with clients in their rooms and that they wanted to be able to have the clutter of the bedroom out of sight. So we knew that having a separate bedroom was important."

This was a change from the Residence Inn concept, Subramanian says, which had many rooms designed in a studio layout. Designing the kitchen also afforded Holiday a chance to modify its previous experience.

"Based on the Residence Inn experi-

New findings with old data using cluster analysis

by Tara Thomas

For the past four years, Blue Cross and Blue Shield of Iowa (BCBSI) has been engaged in extensive consumer research. The purposes have been to uncover how consumers make choices in a complicated decision environment and how they evaluate the component features of insurance programs. Of particular interest has been the influence of service oriented activities on the choices that consumers make. The eventual goal is to determine to what extent choices can be altered by the inclusion or exclusion of service features in health insurance product designs.

During the summer of 1987, BCBSI and IMR Systems, Ltd. began a process that ended with a useful and informative perceptual mapping study of the image of BCBSI in the Iowa marketplace. The research would have been useful to us if the study had ended with that final report. But the true value of the research has been realized with continued analysis of this and other data sets, using two separate clustering methodologies.

The purpose of clustering these data sets was to investigate the possibility that market segments exist for health insurance products. As we recognized the possibility of segments within the data sets under investigation, we began to discuss the strategic implication of these results. Identification and description of the market segments would facilitate product design and distribution, and allow us to position and promote these products appropriately. In addition, understanding consumer choice patterns might eventually allow BCBSI to "custom design" products in a way that would enhance the composition of our insurance risk pools.

Research approach

During the summer and fall of 1988, BCBSI undertook a critical reexamination of five different data sets. The purposes of this analysis were to determine whether or not definable market segments exist and whether segment preferences are reflected in product choices. Four of these data sets were created through ACA (ACA System for Adaptive Conjoint Analysis), the fifth through APM (APM System for Adaptive Perceptual Mapping). Each represented a distinct set of respondents facing very different health insurance decisions. One ACA study examined only service features of health insurance, while the others included both service and insurance attributes.

To uncover possible market segments, the data were clustered using two different procedures: an attribute cluster approach using SPSS/PC+ and a respondent cluster approach using CCA (CCA System for Convergent Cluster Analysis). Though none of the original studies were designed as segmentation studies, the findings were comparable across all five. Across the data sets, two distinct segments emerge in the health insurance industry: one that prefers traditional health insurance products, and one that prefers the features of HMO health insurance products.

Findings and strategic implications

These two segments—the "Traditional" and HMO segments—are comparable across all five data sets. Quite frankly, this is not the result that we expected. In addition, several data sets exhibit what we believe to be initial indications of other emerging segments in the market. Our interpretation is that the market is in transition; new segments will emerge as consumers become exposed to wider choices in health insurance and gain better understanding of their decision environment.

Once the segments were identified using cluster analysis, the data sets were separated to conduct simulation analyses. The

purpose of running the simulations was to determine which BCBSI product might appeal to different market segments. Not surprisingly, and quite reassuringly, those consumers who preferred traditional insurance were attracted to traditional products. And consumers attracted to HMO style insurance preferred HMO products. This indicates to us that consideration of product development for a segmented market was in order for BCBSI.

As a final step, the service features of products were excluded from a second set of simulation analyses. When these service features were excluded, consumer preferences changed—sometimes dramatically. A substantial shift in preference away from the HMO alternatives (which are grounded in high service and convenience) toward the traditional insurance products was apparent for all segments. This indicated that consumers often select their health insurance coverage (when they have a choice) based on how important service is to them; many consumers were willing to give up their choice of physician and other freedoms associated with traditional insurance to obtain enhanced service.

Study background and data bases

Our interest in conducting this health insurance segmentation study was initially raised by an article by Woodside, Nielsen, Walters, and Muller published in the *Journal of Health Care Marketing*. The authors identified four distinct and identifiable segments in the market for hospital services: the "Old-Fashioned," "Value Conscious," "Affluents," and "Professional Want-It-Alls." These four segments seek different benefits from the hospitals they prefer, and have characteristic demographic profiles. The study confirmed the contention of Kotler and Clarke that consumers seek different benefits from health care. Some seek "Quality," some "Service," some "Value," and others "Economy." Review of this research raised the question of whether similar segments existed for health insurance.

Our finding of two distinct and definable segments in the health care market has recently been supported by an article published in *American Demographics*. In April, 1989, Thomas and Sehnert reported on "The Dual Health-Care Market." In particular, the authors identified "Traditional" and "Modern" markets—analogous to the "Traditional" and "HMO" markets we identified in the Iowa marketplace.

Data set characteristics

Five different studies were conducted by BCBSI over the past four years: four conjoint studies and one perceptual mapping study. Two of the studies were conducted with random samples of Iowans; the remainder with client groups. Exhibit 1 illustrates the basic information about the sample composition and survey methodologies used in these studies. Each study was designed for a unique purpose, and the attributes were custom designed for the types of insurance products under consideration. While there are overlaps in the attributes and particular levels included in the studies, the similarities that we will note in segment composition are not simply an artifact of identical studies being conducted with very similar consumers.

Exhibit 1

Blue Cross and Blue Shield of Iowa Research Included in Segmentation Study

Service Unit Study
Sample: 201 adult Iowans covered by health insurance
Methodology: Adaptive Conjoint Analysis
Attributes: Service components of health insurance policies

Image Study
Sample: 403 adult Iowans covered by health insurance
Methodology: Adaptive Perceptual Mapping
Attributes: Image oriented, with some product characteristics

Client Study 1
Sample: 119 employees of a mid-Iowa retailer
Methodology: Adaptive Conjoint Analysis
Attributes: Product and service characteristics of health insurance plans

Client Study 2
Sample: 88 employees of an eastern Iowa county
Methodology: Adaptive Conjoint Analysis
Attributes: Product and service characteristics of health insurance plans

Client Study 3
Sample: 400 employees of a central Iowa company
Methodology: Adaptive Conjoint Analysis
Attributes: Product and service characteristics of health insurance plans

Methodology

Two different clustering methodologies were used to analyze the underlying structure of the five data bases. The first one described uses the statistical procedures included in SPSS/PC+ to develop variable clusters and attendant respondent clusters. This multi-stage process begins with clustering of attribute levels and uses these attribute level clusters to define centroids that enable clusters of individuals to be formed and profiled. The second uses the CCA software developed by Sawtooth Software that clusters respondents based on full attribute-level response profiles.

Attribute-based clustering

The cluster analyses conducted using this procedure were conducted on the five data sets before CCA was commercially available. The methodology developed is a compromise design that allowed clustering of large data bases using SPSS/PC+ QUICK CLUSTER. The analysis steps used are as follows:

1. Utility values for individual attribute levels were examined to determine which were most important to the consumers included in a particular study. The most preferred level from every attribute was always included. Unimportant attribute levels were excluded from the clustering analysis.

2. The remaining attribute levels were clustered as variables using the CLUSTER routine included in SPSS/PC+, and the resulting cluster structure was examined for its plausibility and internal consistency. These variable clusters formed the basis of the consumer segments that were identified and profiled in succeeding steps.

3. CLUSTER analysis was repeated with subsets of the attribute levels until a reasonable and believable solution was found. Attribute levels that clustered "too closely" with another level of that same attribute were excluded at each step.

4. Once an understandable and believable cluster of attribute levels was reached, these clusters were used to define centroids for clustering individual respondents using QUICK CLUS-TER. Centroids were initially defined using "above average" utility values for the attribute levels included in a cluster solution and average levels for all other attribute levels. Membership of individuals in these clusters was determined through the QUICK CLUSTER algorithm, and consumer profiles were prepared.

Respondent-based clusters

CCA was used to cluster respondents into market segments. To implement the CCA methodology, we used the suggestions offered by Sawtooth Software in the User's Manual. The data in the UTIL.PLS files were standardized and centered, and a mixed starting point strategy was utilized. No "hold-out" sample was used, as our approach to this research was exploratory in nature. The average reproducibility and pooled-F statistics were used to diagnose the results and select the best clustering solution. The tables of Reproducibility Due to Chance Alone in Appendix E of the CCA Users' Guide were used to test the null hypothesis that definable clusters do not exist these data sets.

Cluster aualysis findings
THE SERVICE STUDY

This study was designed to isolate the "service" components of health insurance products—for example, claims processing time, personality of customer service reps, and claims filing requirements—from the "insurance" aspects. The objective behind applying cluster analysis techniques to this data base was to determine whether different groups of consumers respond differently to varying service packages. If this was true, "service bundling" could be used to attract consumers to health insurance options that are appropriate for them from an actuarial perspective.

The service study utilized conjoint analysis and included such attributes as "how easy it is to understand the policy," "how do insurance representative treat you," "how frequently are claims updates mailed," and "is the claim paid directly to the physician or not." Respondents were also asked whether they would be willing to pay a higher monthly premium for more preferred service packages. Not surprisingly, consumers as a whole prefer simple and understandable coverage, helpful and informed insurance reps, and "one contact" resolution of claims questions.

Consumers do not want to pay more for enhanced service packages, and having the doctor paid directly is an important convenience. Less emphasis is placed on how communication with the insurance company occurs.

Variable-based clusters

Clustering of variables results in three segments in this service study—the "Efficients," "Automatics," and the "Personals." The Efficients are the smallest segment in this sample, and prefer a policy that is easy to understand, with one contact to the head office to resolve claims, and clarity of communications.

The largest segment, the Automatics, desire very little interaction with the insurance company and are willing to pay more for convenience. They do not want to file their own claims, they expect quick payment, and would like a contact at their company who is knowledgeable about insurance.

The remaining respondents desire the personal touch in insurance products—thus the name Personals. These respondents are willing to visit the insurance company personally to resolve claims and want updates on the status of claims and deductibles. They would like a personal insurance representative. The Personals are more likely to buy their own insurance and have more experience with filing claims.

Market share simulations for these respondents support the finding that "more is better." Many respondents prefer the service advantages and convenience that are offered by HMO-type insurance coverage.

Table 1

Market Share Simulations

Cluster	Commercials	HMOs
Efficients	53%	46%
Automatics	55	45
Personals	55	46

Respondent-based clusters

CCA clusters of this data set revealed two segments of respondents with differing needs and desires for service bundles. The larger cluster values clarity and consistency in the services offered by insurers. These individuals value "knowing the rules" associated with resolving questions, and desire a system where claims questions are resolved through the mail via the main office. They want to know where they stand on a regular basis and are willing to pay more to obtain this kind of system. The response patterns of these individuals reveal that these customers presume that certain things will happen "automatically" in the system, such as claims being paid in 10 days or payment will be made directly to the physician. It is possible that these individuals have not experienced any difficulties in resolving claims, or that they have limited claims-filing experience.

The other cluster wants a simple system for interacting with the insurance carrier. They want a system where they have an individual to contact to resolve claims questions. They expect claims to be paid directly to the physician within 10 days of filing, and they do not want to file claims themselves. They are not interested in a system that involves indirect contact or increased costs.

Market share simulations were prepared for each of the two segments. The unusual finding is that all respondents prefer the high levels of service offered by HMOs, although the "HMO Segment" exhibits a stronger preference than the "Traditional Segment." The remaining shares of preference are evenly split between service packages typical of BCBSI plans and those of other commercial carriers.

Table 2		
Market Share Simulations		
Cluster	Commercials	HMOs
Traditionals	56%	44%
HMO	47	53

THE IMAGE STUDY

This study was one of the earliest research efforts undertaken by Blue Cross and Blue Shield of Iowa. The objective was to understand the perceptions that Iowans have of BCBSI in the marketplace, compared to our many competitors. Perceptual mapping was used to develop visual images of the health insurance market for Iowa, and to show the perceived position of various companies within the market. The basic map of the marketplace is illustrated in Exhibit 2. Of note is the fact that the HMOs cluster (in terms of customer perceptions) along the left edge of the horizontal axis. The other commercial carriers included in the research are located centrally and to the right. It is clear from this visual presentation that consumers distinguish among the various health care alternatives available to them in the marketplace. The question is whether there are segments within this market with differing perceptions and accompanying product preferences. Clustering was done on respondent perceptions of health care alternatives.

Variable-based clusters

The clustering of variables identified three clusters in this perceptual mapping study. To form these clusters, only service and product attributes were included. "Imagery" attributes were excluded, as the primary interest was focused toward

Exhibit 2

CONSUMER MARKET STRUCTURE PERCEPTIONS
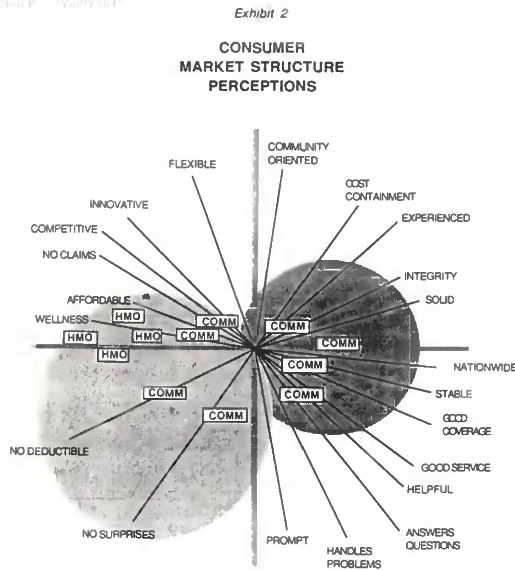
service and product design. Again, these clusters could be described as Efficients, Automatics, Personals.

The Efficients are the largest group in this segmentation strategy. These respondents want an insurance company that is helpful and trustworthy, pays claims promptly, handles problems fairly, and answers questions quickly. They also want the

Exhibit 3

TRADITIONAL MARKET PERCEPTIONS
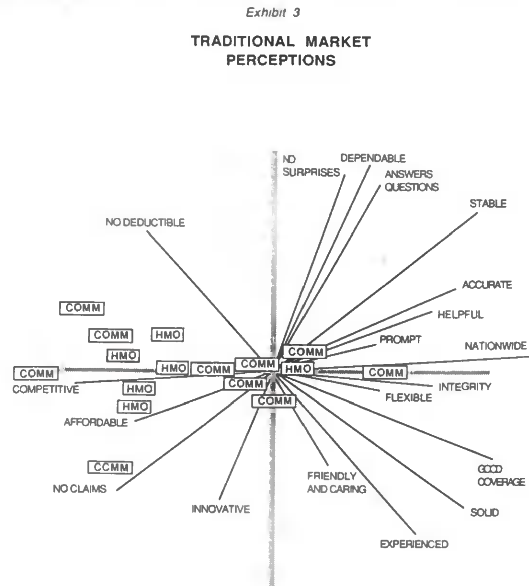
insurance company to provide good, accurate service.

Those consumers desiring "Personal" service want their insurance company to be friendly, caring, and flexible in dealing with claims problems or questions. They do not want any surprises from the insurance company. These respondents represent the smallest group in the sample and are less likely to receive insurance coverage from their employers. The last group, the Automatics, represent the remainder of the sample, and are only concerned about one characteristic: coverage where there are "no claims forms to send in."

Respondent-based clusters

When CCA was applied to this data, two stable clusters of respondents were identified. The smaller cluster includes individuals who want a traditional insurance carrier—much like BCBSI or the other commercial carriers. These respondents are older, with lower incomes than others who participated in this research. Demographically, these respondents are similar to those described by Thomas and Sehnert. The perceptual map for these respondents (Exhibit 3) illustrates their view of the insurance marketplace. The horizontal dimension represents the traditional characteristics of insurance. The vertical dimension represents "service and human" characteristics.

The second cluster includes respondents who prefer the convenience of a "non-traditional" approach to health care. Their attributes of importance: no claims forms to send in, no annual deductible, community oriented, innovative, and non-profit. The horizontal dimension of the perceptual map for these respondents (Exhibit 4, *p. 16*) is characterized by typical HMO characteristics. The vertical dimension represents traditional insurance.

THE CLIENT STUDIES

The three client studies were designed to explore the preferences of consumers who are faced with multiple health insurance alternatives. The respondents in all three studies work for companies that either have implemented or will be implementing insurance options where the employee has a choice from

among several insurance alternatives. Typically, these choices consist of traditional comprehensive major medical (CMM) in-

surance programs, managed care options like preferred provider organizations (PPO), and HMOs.
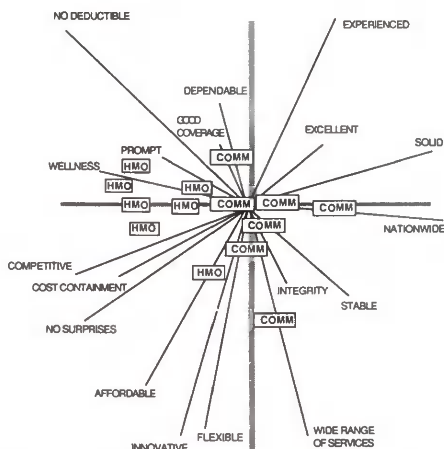
Of interest to insurers is how consumers will make their product selection: Will the final selections of consumers be based on level of coverage, style of health care coverage, or anticipated patterns of health care utilizations? And are there segments of consumers with clearly definable decision styles who will be attracted to particular products? Although we typically use these studies in a consulting role to help employers

understand the needs and desires of their employees, the information gathered from these studies is very interesting to BCBSI from a product development and design standpoint.

These three studies are conjoint studies where the attributes are defined as components (both service and insurance features) of health insurance alternatives that the company is considering making available to their employees. The attributes can be bundled to create product configurations that match the products currently offered in the marketplace. The respondents in two of these studies have not experienced a choice of health insurance options before, and are therefore naive about implications of the choices they might make. The third group of respondents have experienced making choices, and should understand the implications of their choices.

Reanalysis of all three data sets indicates the presence of two or three segments in the data. One of the segments in each case is an HMO segment—appreciative of the convenience and full coverage of HMOs. The second segment is a "Free Choice" segment that prefers to have no limitation on the choice of physician. These respondents prefer a more traditional approach to the provision of health insurance. The third segments that exists in the data bases is harder to explain and understand. We hypothesize that this segment may consist of individuals who cannot integrate the complex information presented to them in a multiple-choice environment, and whose pattern of product and service preferences is therefore not as clear as for the other two segments.

In this report, the results for only one of the three data sets will

be reported. All three data sets lead to similar conclusions, and the patterns of preferences and market shares are likewise similar across the data. The data that will be reported are for the 400 respondents of a mid-Iowa corporation.

These respondents have made health insurance choices in the past, and are familiar with the differences in coverage offered by the alternatives available to them.

Variable-based clnsters

Two strong clusters were identified from the variable-based clustering methodology. The HMO cluster accounts for the largest proportion of the respondents. The preferences of this cluster are typical of the coverages offered by HMO products: All charges for all services are covered for participating physicians and pre-approval is necessary for some procedures and hospitalizations.

The other cluster values the freedom to choose their own physicians. This Free Choice cluster tends to be better educated and married. The product preferences exhibited by this group include the ability to choose any doctor, no annual out-of-pocket expenses, nationwide coverage, and no pre-approval requirements for treatment.

Two sets of market share simulations were run for each segment. The first simulation includes all of the service and product attributes included in the study. The second simulation excludes the service attributes. With all attributes included, consumers in both clusters prefer HMO alternatives. When the service characteristics are excluded, however, there are signifi-

cant preference shifts toward the CMM and PPO care alternatives. Tables 3 and 4 illustrate these preferences.

Table 3
Market Share Simulations
All Attributes Included

Cluster	CMM	PPO	HMO
HMO	17%	15%	67%
Free Choice	23	32	45

Table 4
Market Share Simulations
Service Attributes Excluded

Cluster	CMM	PPO	HMO
HMO	19%	20%	62%
Free Choice	23	38	38

Respondcnt-based clusters

CCA again identified two main market segments: the Free Choice Segment and the HMO segment. The Free Choice segment includes respondents who prefer those characteristics normally associated with CMM and PPO product alternatives. These include the freedom to chose a physician, limited annual deductibles and out-of-pocket costs, and require that the consumer file all medical claims.

The HMO segment desires full coverage for all services, even if this means limitations on their choice of physicians. They also

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like automatic claims filing and the no annual out-of-pocket cost provisions of HMO coverage. These younger consumers have higher educational attainment than others included in the research.

The market simulations for these two segments mirror the pattern found with the variable based-clusters. Again consumers switch from HMO-style coverage when service attributes are excluded from the simulations.

Table 5 Market Share Simulations All Attributes Included			
Cluster	CMM	PPO	HMO
HMO	18%	13%	70%
Free Choice	22	32	46

Table 6 Market Share Simulations Service Attributes Excluded			
Cluster	CMM	PPO	HMO
HMO	19%	18%	63%
Free Choice	22	37	40

A market in transition

In this data set there is considerable evidence of a market in transition. Our belief is that the market is evolving, and that the impetus for this evolution comes from the consumers themselves. The development of alternative health insurance coverage systems such as HMOs and PPOs has not only revolution-ized the health insurance industry, but the thinking of the consumer as well.

In this client study, two clear market segments emerged: a segment that strongly desires freedom of choice and a segment that prefers an HMO alternative. Diagnostically, however, the five-cluster variable-based cluster is as plausible as the three-cluster respondent-based cluster. While difficult to summarize, careful and repeated application of these methods leaves us with the opinion that these additional segments are not ephemeral or transitory, but are very real indicators of an evolving market.

Variable-based elnsters

The five-cluster solution here is as plausible as the strong two-cluster solution. It would be easy to dismiss this solution, except for the fact that the cluster sizes are large enough to be considered significant, and the demographic compositions of the clusters differ. It is possible that there are customers in this market who are not satisfied with the health insurance coverage decisions they have made in the past. This is best illustrated by Cluster Two, where the grouping of attribute levels does not make sense. This cluster is willing to pay $20 more a month for a program that requires pre-approval. This could indicate that they are willing to pay more while giving up some of their decision making freedom.

This combination of attributes may indicate that they believe they are not currently getting the kind of coverage they might prefer. Table 7 breaks out the attribute levels that dominate for each of these five clusters.

Table 7 Five Cluster Solution
Cluster One (19% of the sample)
Full payment for certain doctors
All services covered
Deductibles for ER and physician visits
Cluster Two (21% of the sample)
Pay $20 more per month
Pre-approval required
Cluster Three (21% of the sample)
Full payment for any doctor
Pre-approval not required
No annual out-of-pocket expenses
Cluster Four (25% of the sample)
Claims filed automatically
Pay $40 more per month
Cluster Five (15% of the sample)
Pays at 80% for any doctor
Pays at 90% for certain doctors
Unlimited nationwide coverage
Pre-approval sometimes required

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Domino's delivers

Powerful PCs help the Domino's Pizza research staff give its internal customers speedy service

Every day, people across the country order thousands of Domino's pizzas. Part of Taylor Bond's job is making sure all of those pies get counted properly. Bond is market analysis director at the Ann Arbor, Mich. headquarters of Domino's Pizza, and he says that though the Domino's market research department receives sales figures from 5,000 stores weekly, it has no problem manipulating the numbers—thanks to a powerful PC network.

"We have very large databases by PC standards—most of our hard drives go from 100 megabytes to 800 megabytes—and we have very, very good PCs that allow us to process data quickly and efficiently. Domino's has made sure we have the right equipment to do what we need to do. They take research seriously and they've provided us with good equipment to work with.

"We're not as mainframe-oriented as some other companies. We have mainframes here, but our market research department is more PC network-oriented. We prefer PC's because we believe they're easier to deal with; they're easier to get, and easier to maintain. If you try to make your mainframe bigger, it's an enormous expense."

In-house analysis
Unlike the research departments in other similar-sized companies, the Domino's research department handles all data analysis in-house.

"We use our suppliers to gather information for us and then we do the analysis. The sizes of the problems we tackle are

probably larger than the average market research departments in other fast food companies. Domino's has a good-sized, well-qualified and experienced market research department. We can come up with decisions quickly because the information is here."

Bond says that the two most important types of information they receive from the stores are sales figures and pie counts (which indicate the quantities of each type and size of pizza sold). This information is combined with other internal tracking sources, marketing information, and syndicated sources that report on the restaurant industry, such as NPD's CREST (Consumer Reports on Eating

Share Trends), to answer the many questions the department is asked by management.

Field information
Key to that process, Bond says, is information from the field, supplied by everyone from store managers to regional managers.

"They may not know as much about how their trends are changing, but they know more about what's going on in the store, and that's the part that we don't have available. We use the statistical information and combine it with what we know is actually going on in the field, because you can't just churn out a bunch of numbers and say, 'This is what's happening.'

"If you're asking questions at the regional level, you want to find out what the region was doing to promote the product, because if you're trying to find out how effective a promotion was, you want to be aware of what differences exist across the country. For example, I always try to get a feel for whether or not they were doing local marketing to supplement the national effort."

75 variables
Stores are tracked by 75 variables, including average weekly sales, location, when it opened, whether it is corporate-owned or a franchise, etc.

"When I'm doing an analysis, I may code the stores for various pieces of information that will help me describe each store individually. The variables are designed to sift the information, because sales figures alone mean nothing; you have to explain them."

Pie count, for example, is very important because it can indicate shifts in customer preference—wanted and unwanted. "How many you sell and what you sell makes a big difference. If you're promoting a particular size of pizza you want to know if people are buying it, and if so, where are they coming from? If you promote a small pizza, are you pulling away your large pizza. eaters? And if so, are you pulling away too many?"

The kinds of questions the Domino's research department is called upon to answer typically deal with sales on a national level, the effects of policy decisions, and results from test markets, and the success of new promotions.

"One of the ways we evaluate the success or failure of a sales promotion involves looking at sales prior to, during, and after the promotion. We look at what sales are versus a year ago, versus short-term trends, and those weeks immediately prior to the promotion."

Sales increases are examined in relation to goals set—did they meet or exceed the goals? Did the promotion attract new customers? Competitors' promotional efforts during those time periods are also examined.

For example, last May Domino's introduced pan pizza nationally. Bond says that prior to the introduction a substantial amount of research was done to test its viability, looking at two key areas: the competition and consumer demand.

"We wanted to find out if, by introducing pan, we would be taking our own customers and converting them to pan pizza from other products. Or would we be attracting new customers? We found that after the introduction, we were attracting new customers; there were a lot of people trying our product who have continued to eat Domino's pan pizza. So

from that standpoint, it's been a success."

An analysis of sales figures immediately before the national introduction and for a six-week period afterward show that pan pizza is also a success in terms of overall sales increases.

Consider promotions

When analyzing sales figures, Bond says it's also important to take into consideration any promotions your own company might have been doing during the same time period.

"If you run several promotions together it's difficult sometimes to get a clear picture of 'before.' If you have a clean

Savings and loan associations worry many consumers

A study by Opinion Research Corp. reveals that most of today's consumers see savings and loan associations as being less attractive than banks on several dimensions, and a vast majority are reluctant to entrust their savings to an S&L. These findings reflect the severe and prolonged economic and political battering that the savings and loan industry has suffered in recent years. Federal efforts to bail out the industry, coming on the heels of a series of fraud allegations and well-publicized bankruptcies, may actually have compounded the public's negative image of S&L's.

Few consumers—only one in five—would choose to save with an S&L if they could find a bank willing to pay the same interest rate. This preference may condemn the S&L industry to a self-defeating cycle of paying imprudently high interest rates to compensate savers for the
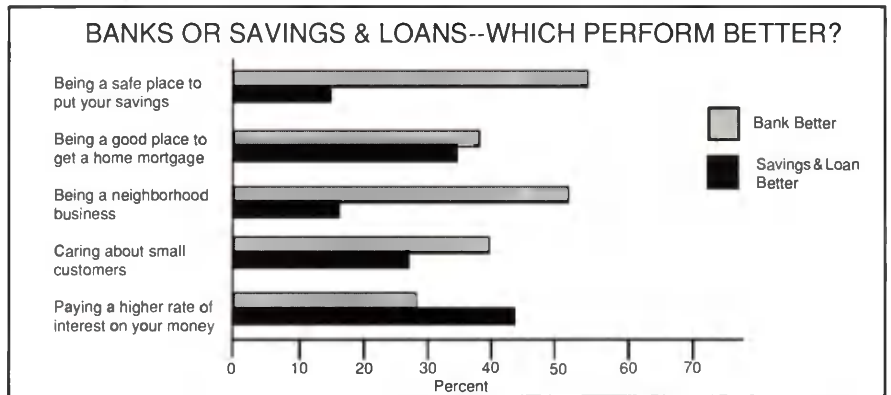
BANKS OR SAVINGS & LOANS--WHICH PERFORM BETTER?

Being a safe place to put your savings

Being a good place to get a home mortgage

Being a neighborhood business

Caring about small customers

Paying a higher rate of interest on your money

Bank Better

Savings & Loan Better

Percent

perceived higher risk of an S&L account. And these higher interest rates could further undermine the financial stability of the industry.

The public attitudes underlying consumers' preferences are not encouraging for the S&L industry. Consumers are four times as likely to believe that a bank is a secure place for their savings as they are to consider an S&L a safe haven for their money. Consumers also rate banks higher than S&Ls for caring about small customers, being a neighborhood business, and by a slim margin see banks as being a better place to get a home mortgage.

Consumers do see savings and loan institutions as paying higher interest rates than banks, but this perception is at best a double-edged blessing for the S&L industry. Higher interest rates imply higher levels of risk for many consumers, and in any case it is extremely unlikely that most S&Ls can pay the premium rates that most consumers now demand for investing in a savings and loan account. Consumers say that an S&L interest rate on savings would have to be 3.3 percentage points higher than a bank's in order for

Gail Rapoport has joined Cramer-Krasselt as a research supervisor in the Chicago office. Previously she was with Goldring & Co., Chicago.

Market Research Institute, Kansas City, has named **Don Weston** general manager.

Weston   Becker

Ken Beeker has been elected to the board of directors of St. Paul-based Rockwood Research.

Thomas W. Farrand has been named president of C.A. Walker & Associates, Los Angeles.

Farrand   Dupont

Thomas Dupont has been promoted to president of New York-based Oxtoby-Smith, Inc., succeeding **Joseph Smith,** who becomes chairman.

Cincinnati-based Burgoyne Market Research has promoted **Thomas V. Schneider** to president.

Schneider

Healthcare Knowledge Systems announces the appointment of **Ellen A. Rudnick** to president. Previously she was with Baxter Healthcare Corp.

Michael Alatzas has joined CMR Market Research, New York, as executive vice president. Previously he was with McCollum Spielman.

Kate E.H. Prescott has been named vice president/associate research director at Della Femina McNamee WCRS in Pittsburgh.

James C. Crimmins has been elected an executive vice president of DDB Needham Worldwide. He is director, strategic planning & research in the Chicago office.

Joy Brown has joined Directions In Research, San Diego, as client services director. Previously she was with A.C. Nielsen.

Analytical Computer Service, Inc. has opened an office in the Boston area at 42 Pleasant St., Watertown, MA, 02172. Phone 617-923-8800. Jerome Madansky, president of ACS, and Art Shane, founder of Strawberry Systems, Inc. have joined in an association to create an expanded marketing research service bureau for the greater Boston area. In conjunction, ACS has acquired the exclusive marketing rights to Strawberry Software, Inc.'s A-CROSS cross tabulation software program.

Centrac, Inc. announces the relocation of their headquarters to 48 Industrial West, Clifton, NJ, 07012-1712. Phone 201-777-6000. Fax 210-777-7134.

Walonick Associates, Inc. have changed their name to **StatPac Inc.**, to be consistent with their marketing research software package StatPac. The address and telephone numbers will remain the same.

Marketeam Associates/Doane Marketing Research, Inc. has moved into expanded office space. The new address is 1807 Park 270 Drive, Suite 300, P.O. Box 46904, St. Louis, MO, 63146. Phone 314-878-7667. Fax 314-878-7616.

Dallas Focus has opened a new facility in Irving, TX. It features three focus group rooms, each with its own viewing room, a client lounge, a kitchen, and a telephone center. The address is 511 E. John Carpenter Fwy., Ste. 100, Dallas, TX 75062. Phone 214-869-2366. Fax 214-869-9174.

System evaluates promotion success

A system that offers both manufacturers and their sales forces documented information about the success of their promotions is available from Arbitron/SAMI. Known as the SAMI Promotion Evaluation System, this service can answer specific quantifying questions regarding promotional strategies and decision. To address such questions, the system begins by calculating what volume would have occurred in the absence of a particular promotion or promotional event. This base volume is referred to as a Baseline. Once the Baseline is determined, the Promotion Evaluation System can provide reports that quantify the effects of in-store trade support (display presence, feature advertising, and shelf price reduction). For more information, phone 212-887-1300.

Interfaee for A-CROSS and ACS QUERY

In conjunction with its acquisition of the marketing rights to Strawberry Software Inc.'s A-CROSS cross tabulation software program, Analytical Computer Service, Inc. (ACS) has developed an interface between A-CROSS and ACS-QUERY, called Q-LINK, which loads the answer test and card column definitions from an ACS-QUERY questionnaire into A-CROSS and creates tables and a dummy banner for each question. For more information, contact Amy Yoffie at ACS at 201-232-2723.

Quality management program expanded

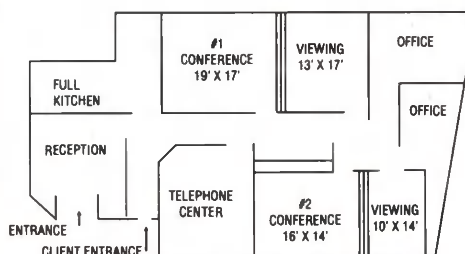Total Research has expanded its management programs designed to measure,

monitor, and improve customer satisfaction and quality management. Under the new program, clients will be offered a broader perspective on customer perceptions and behavior related to the quality of their services, products, and organizations. Increased research and consulting will focus on such quality issues as product design and function, and customer-focused organizational development as well as service.

LOS norms available for PC

The 1988 CPHA Length of Stay norms are now available in software format for users with IBM compatible PCs from Healthcare Knowledge Systems (HKS). The new Electronic Length of Stay (eLOS) software gives users the same data contained in the annual Length of Stay by Diagnosis and Operation books published by CPHA for the last 25 years and now marketed by HKS. Users spec-

ify the patient's condition by ICD-9-CM code, diagnosis or operation group, or key words; the system prompts them for a few more details and then pulls up the appropriate LOS table. eLOS is positioned between the CPHA LOS books, for manual look-up, and the CPHA LOS tapes, which incorporate the data files into the user's mainframe system. It runs on IBM ATs, PS/2s, or true compatibles with hard disk and 640k memory. The eLOS norms reflect more than five million patient discharge records from short-term U.S. hospitals—CPHA's traditional PAS participants plus other providers around the country. Clients can purchase software for one or more geographic regions or for the U.S. as a whole. For information, call 313-930-7830, ext. 3534.

Software package for electronic form design and management

A new software package that can design and manage electronic forms has been introduced by Digisoft Computers, Inc. The software, Telescript, is tailored for telephone interviewing and can automate marketing research, telemarketing, customer service and similar applications using local area networks. Telescript includes an interface into PC databases where a user can both store and recall information from within any script. In addition, it can create questionnaires with conditional branching and other logic, and is flexible enough to support text, numeric, computation, date, time and other responses of a questionnaire. It can also add columns and perform calculations on screen. The package supports 1-100 users working simultaneously and can monitor and control all Telescript activity. A supervisor can sign on from any workstation and change jobs, users, scripts, and more while work is ongoing. Telescript will report all activity, including call length, disposition, and operator effectiveness. For more information, call 212-289-0991 or write Digisoft Computers, Inc., 245 E. 92nd St., New York, NY, 10128.
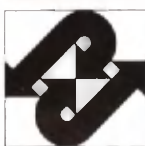
ence, we felt going in that the kitchen was an important signifier of the home-like atmosphere, but outfitting each room with a full kitchen could cost a great deal of money. Through research we were able to scale back the kitchen area, which allowed us to price the product very competitively."

Other amenities

Beyond in-room features, the research also identified other amenities the Homewood Suites locations should provide to serve the needs of the long-term guest.

Each hotel lobby has a central area called the Lodge, which combines the usual front desk arrangement with a large, comfortable meeting space. A self-service convenience store located in the Lodge offers microwaveable foods and a variety of necessities. An exercise room is also available. An executive center provides access to PCs, a fax machine, a copier, and a typewriter beyond normal business hours.

"Many of these people are with clients from 9 to 5 and they come back with homework, so they may need to use a fax machine or a computer," Subramanian says.

Service is an important part of the Homewood Suites package. "We're trying to differentiate ourselves from a service culture standpoint. Service quality and personal recognition were rated quite high in the research. Employees are trained to recognize the guests and be very personable. We want to make them feel at home."

Research instrumental

Subramanian says that research was instrumental in Holiday's ability to move Homewood Suites quickly from its development stages to the construction of the first site.

"It was one of the few times in our industry that customer input was sought fairly heavily in the design stages of a product. The lodging industry is still a business that is run by developers, who build according to what feels good. And they're right a lot of times, but it's getting increasingly competitive and customer input and research is playing a bigger and bigger role up front in the product development cycle."

Currently, there are four Homewood Suites open in the U.S., in Memphis (a parent company-owned location which will be used as a training ground), Dayton, Ohio, Omaha, and suburban Dallas. Subramanian says that 25 locations should be open within a year, and over 175 are planned in the coming years.

Though the chain has much ground to gain on Residence Inns (according to *Lodging Hospitality* magazine, Marriott has over 130 Residence Inns located in 38 states, and the company plans to spend $1 billion in the next five years to build an additional 150+ sites), Subramanian says Homewood Suites is prepared for what lies ahead.

"Residence Inn is the industry leader in this segment, but Homewood Suites has got a lot of development going on. We're poised to challenge Residence Inn." ❏

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 listing rates: Quirk's Marketing Research Review, P. O. Box 23536, Minneapolis, MN 55423. 612/861-8051.

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Market Research Corp.
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Focus Groups,One-On-Ones

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

Cleveland Field Resources, Inc
6501 Wilson Mills Rd., Suite J
Cleveland, OH 44143
216/473-9941
Contact: Daniel McCafferty
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Contact: Saul Cohen
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Recruit / Moderation/Analysis

Consumer Opinion Services
12825-1st Ave. South
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206/241-6050
Contact: Jerry Carter
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215/668-1660
Contact: Phyllis Rosenberg
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Timonium, MD 21093
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Telecommunications,Financial

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Consumer,Pkgd Goods,Agric.

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Concepts, Package Goods

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Trade News

them to invest their savings in an S&L. Almost one consumer in ten say they wouldn't entrust their money to a savings and loan no matter what level of interest was offered.

The uneasiness is also pervasive among the 26% of all consumers who currently hold a savings account with an S&L. This group, while not as negative towards the industry as consumers as a whole, harbors some serious doubts about the stability of S&Ls and often offers only tepid support for S&Ls when comparing them with banks. Only one-quarter of S&L customers believe that S&Ls are safer places for their savings than banks are, compared with one-third who believe that banks offer greater safety than do S&Ls. While most S&L customers are not concerned about the safety of their own S&L account, one-quarter (28%) are concerned about security and one-tenth of them (9%) have seriously considered closing their accounts.

These safety concerns are offset by S&L customers' perceptions that S&Ls are better than banks at providing home mortgages, caring about small customers and offering high interest on savings. However, if a bank paid the same rate of interest, as many S&L customers would choose to place their savings there as would select an S&L. The savings and loan industry thus has, at best, a loose grip on its current customer base, while it faces an extremely difficult task in attracting new customers.

Survey finds mail order offers convenience, satisfaction

A Maritz AmeriPoll found that 52% of the respondents ordered merchandise by mail at least once in the past year. 25% said they shopped by mail 1-3 times, 13% said 4-6 times, and 10% said 7-15 times. Four percent of respondents averaged over an order per month, shopping by mail more than 15 times in the past year.

According to the survey, men are not as likely as women to order merchandise by mail. Overall, 47% of men purchased an item by mail in the previous 12 months, compared to 57% of women. Twenty-three percent of men used mail order 1-3 times, as did 29% of women.

WHY WE PURCHASE BY MAIL
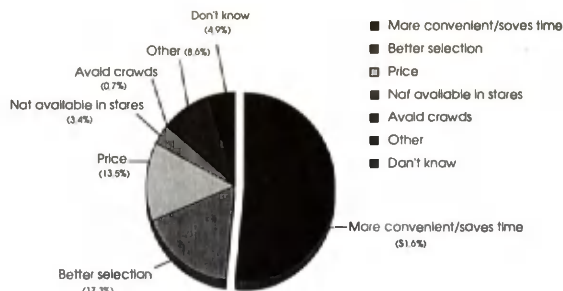
When asked what items they're most likely to purchase through the mail, respondents who shop by mail listed over 17 categories, ranging from books to toys. Forty-two percent of women, and 31% of men, said clothing is the item they're most likely to order—making it number one overall. Next came books and magazines, followed by records or cassettes. Home decorations and kitchen merchandise rounded out the top five items on the list.

SATISFACTION GUARANTEED
How Respondents Feel About Merchandise Purchased By Mail
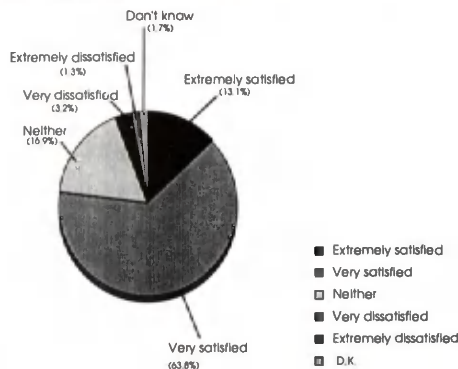
Over half of those who shop by mail said the reason they did so is because it saves time or is more convenient. Another 17% said they were able to obtain a better selection of merchandise. Fourteen percent told interviewers they use mail order because of better prices. Only 1% of respondents said they shop by mail to avoid crowds. Almost twice as many men as women listed price as a reason

MAIL ORDER MERCHANDISE
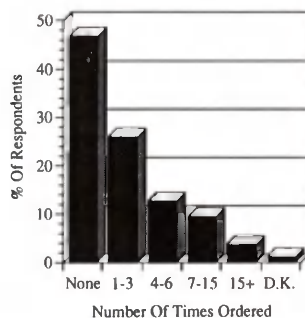How Often We Shopped By Mail In the Past Year

they order by mail; conversely, more women than men said they use mail order because of convenience.

Apparently, most people who shop by mail are happy with their purchases. An overwhelming 77% said they were extremely or very satisfied with their purchases. Seventeen percent were neither satisfied nor dissatisfied. Only 5% of consumers were very or extremely dissatisfied with their orders.

But even with with such high satisfaction ratings, the frequency with which Americans order by mail doesn't seem to be increasing. The survey shows that of all respondents, 22% ordered by mail less often in the past year than in the previous years. On the other hand, the majority (58%) ordered about the same, and 16% ordered more frequently than in previous years.

A miraculous story

According to a recent OmniTel survey conducted by R.H. Bruskin Associates, seven out of ten adults believe in miracles; when asked, "Do you believe in miracles?" 69% of all adults answered "yes." 75% of women believe in miracles, while only 62% of men do. Looked at by age, the results show that 67% of 18-24 year olds, 71% of the 25-64s, and 62% of those 65 or over believe in miracles.

Domino's

prior period where nothing else was going on promotionally then you can get a better read on the success or failure of the promotion than if you're running two promotions with only one or two weeks between them.

"We usually use a four to six week prior period and the importance of the 'after period' depends on what the promotion was designed to do. For example, with pan pizza the after period is very important because the idea was to introduce the product, sustain the sales increases, and to increase our customer base and maintain it, and we have done that."

Specific software needs

In performing many specialized analysis tasks with large quantities of data, the Domino's research department has developed specific needs from the software packages it uses.

"From a statistical standpoint, it has to

"Processing speed is very important. Analysis is relatively easy for the most part when you compare it to the time it takes to process the data, to get it down to a form that you can use it in. When you've got a 10 or 20 megabyte file and you have to summarize it in a form you can use, that normally takes longer than the analysis."

Taylor Bond

be able to do a lot of things. It has to be able to process huge data files quickly and efficiently. I've run into a lot of problems with upper limits on the size of the data (some packages) can handle. It has to be flexible, with a command language that allows you to manipulate your data very quickly without having to program every step of the way.

"Processing speed is very important. Analysis is relatively easy for the most part when you compare it to the time it

takes to process the data, to get it down to a form that you can use it in. When you've got a 10 or 20 megabyte file and you have to summarize it in a form you can use, that normally takes longer than the analysis."

Bond says that Systat is the package he finds most useful. "I have not been able to find a database that Systat can't handle. It has a very fast sort routine which helps us out when we want to break things out by different variables. It's more of a query system. We can ask questions and write a program to determine what the sales trends were—because trends are the big thing. Did the promotion shift a trend? Is it helping sustain a trend? Using the ANOVA packages or the statistical descriptive information that it gives you, you can begin answering those questions."

Testing computer system
In the future, Domino's may have even

more information at its fingertips, thanks to a computer system—now being tested at the company's headquarters—which would retain information on customer ordering habits and preferences for up to a year. The files would include information on everything from pizza topping choices to delivery instructions and payment methods.

"Unlike packaged goods firms—who would kill to know their who their customers are—we already know who our customers are. They give us their name, address, and phone number! The computer system is a means by which we can service our customers better. We feel that if we know who they are, and we have an idea of what they like and what they don't like, we can provide faster and more personal service. We think it will improve the overall Domino's Pizza experience." ❏

Data Use

Respondent-based cluster

The CCA clustering methodology identified three viable clusters. The HMO and Free Choice clusters are similar to those described before. The third cluster, which is the smallest of the three, is more difficult to interpret. This group of respondents values the following characteristics of health insurance:

Pay $40 more a month
Pre-approval always required
Limited annual deductibles
Must file all claims
Regular updates on claims status
Limited annual out-of-pocket costs

Demographically, this third cluster differs from the sample in one way. This group of respondents has significantly lower educational attainment than other respondents. It is likely that this group is trying to avoid catastrophic costs often associated with health care. Another possible explanation is that these respondents are not satisfied with health insurance decisions they have made in the past, but do not know how to integrate complex coverage information to make a better or wiser decision.

From a technical standpoint, this market segment is very stable as the number of clusters increases from three to four and more. CCA output includes a "switching matrix" that details how many respondents switch from one cluster to another as the number of clusters increases. Very little "switching away" from this cluster occurs as the number of clusters increases.

Conclusions

There is considerable evidence in the recently completed segmentation work that the health insurance marketplace is in transition. The belief of the primary researchers is that the market is evolving, and that the impetus for this evolution comes from the consumers themselves. The development of alternative health insurance coverage systems such as HMOs and PPOs has not only revolutionized the health insurance industry, but the thinking of the consumer of health insurance as well.

The five data sets examined by BCBSI give clear indications of two strong consumer segments in the market: a traditional insurance segment and an HMO segment. These two segments are present and stable across the data sets. Several of the data sets, however, exhibit less stable, but potentially significant additional segments. The preferences of these segments are not always clear, but their presence cannot be denied.

The diagnostics for the client study reported indicate that the five-cluster variable solution may be worth examining. Although the two-cluster solution is the strongest, and clearly optimal, the five-cluster solution indicates the presence of two or three market niches whose product and service expectations may not be well met by either traditional or HMO products. The question is whether these consumers are slipping through a gap somewhere, and whether they might be more likely than others to change their coverage.

While they are difficult to summarize, careful and repeated examination of these two data sets leaves us with the opinion that the additional segments observed in the data are not ephemeral or transitory in nature, but are very real indicators of an evolving market.

The existence of distinct and definable groups of consumers with differing preferences for levels and forms of service raises an opportunity for BCBSI. There is the potential to integrate service into future product development and research in a way that enhances the probability that individual consumers will be attracted to the product that is most appropriate for them from an actuarial perspective. This research demonstrates that bundling of product and service features can be used to develop optimal products.

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Quirk's
MARKETING RESEARCH
Review

1990
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OF

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    547 Howard St.
    San Francisco, CA 94105
    415/777-0470
    Fax 415/777-3128
Section I, II, III, IV
(See Advertisement on Page 49)

Concurrent Mktg. Sys.
4807 Bethesda Ave., Ste. 216
Bethesda, MD 20814
301/657-0199
Section III

Concurrent Technologies Corp.
26 Broadway, Ste. 1264
New York, NY 10004
212/248-7233
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Consulting, Hardware & Processing, Inc.
1393 Old Trenton Road
Trenton, NJ 08690
609/586-8577
Section I, III, IV

Consumer & Professional Research, Inc.
3612 W. Lake Street
Wilmette, IL 60091
708/256-7744
Fax 708/251-7662
Section I, II
(See Advertisement on Page 25)

Consumer Pulse, Inc.
725 South Adams
Birmingham, MI 48011
800/336-0159
Section I

Coremat, Inc.
1707 81st Street
No. Bergen, NJ 07047
201/861-2934
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435 Hudson Street
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    203/222-0838
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Creative Computer Services
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214/358-4493
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Creative Research Systems
15 Lone Oak
Petaluma, CA 94952
707/765-1001
Fax 707/765-1068
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Crunch Software Corp.
5335 College Ave., Ste. 27
Oakland, CA 94618-1416
415/420-8660
Fax 415/420-8174
Section III

Cybernetic Solutions Co.
372 W. 800 So.
Alpine, UT 84004
801/756-8279
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Data Lab Corp.
7333 North Oak Park Ave.
Niles, IL 60648
708/647-6678
Section I,II

Datalogics
P.O. Box 287
Solebury, PA 18963
215/794-7486
Fax 215/794-3177
Section I, II, III
(See Advertisement on Page 40)

Datamap, Inc.
6436 City West Pkwy.
Eden Prairie, MN 55344
612/941-0900
Section III

Datan, Inc.
301 No. Harrison, #482
Princeton, NJ 08540
609/921-6098
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Datanetics
114 No. Beatty St.
Pittsburgh, PA 15206-3002
412/363-3282
Fax 412/362-3733
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Data Probe/Datatab
770 Broadway
New York, NY 10003
212/475-7800
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Data Tabulating Service, Inc.
3323 Chamblee-Dunwoody Rd.
Chamblee, GA 30341
404/455-0114
Fax 404/458-8926
Section I, II

DataTactics, Inc.
555 Presidential Blvd., Ste. 430
Bala Cynwyd, PA 19004
215/668-1660
Fax 215/668-1664
Section I, II

Data Vision Research, Inc.
29 Emmons, A-2
Princeton, NJ 08540
609/987-0565
Section I, II

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4922 Ellsworth Ave.
Pittsburgh, PA 15213
412/682-3844
Section III

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Charlotte, NC 28222
704/536-7721
Section III

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609/452-8228
Section III

Devcom Mid-America Inc.
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Oak Brook, IL 60521
708/574-3600
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DigiData Entry System
9637 E. Gold Dust Avenue
Scottsdale, AZ 85258
602/391-0552
Section III, IV

DigiSoft Computers
245 E. 92 Street
New York, NY 10128
212/289-0991
Fax 212/360-7423
Section II
(See Advertisement on Page 41)

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70 Seaview Ave/P.O. Box 10250
Stamford, CT 06904
203/353-7474
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    Oakbrook Terrace, IL 60148
    312/495-1211

    2401 E. Katella Avenue
    Anaheim, CA 92806
    714/978-1122
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213/453-3734
Section III, IV

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303/442-6947
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178 Phillips Road
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716/265-4040
Section II,III

ECF Systems Development
31955 10th Ave.
Laguna Beach, CA 92677
714/499-5135
Section III
(See Advertisement on Page 36)

Enertronics Research, Inc.
1910 Pine Street
St. Louis, MO 63103
314/421-2771
Section III

Express Data Center
205 Lexington Avenue
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212/679-2500
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FacFind, Inc.
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Fassino Associates
213 Elm Avenue
Media, PA 19037
215/858-2487
Fax 215/558-1727
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Ferox Microsystems, Inc.
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Arlington, VA 22209
703/841-0800
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Focus Research Systems
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203/676-2200
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Lyme, NH 03768-9713
603/795-2183
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GMD Incorporated
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Atlanta, GA 30350
404/587-0934
Section IV

Hawthorne Software Co.
P.O. Box 35
Hawthorne, NJ 07507
201/304-0014
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Hodges & Associates
1403 Pemberton Road
Richmond, VA 23233
804/740-7439
Section III, IV

IMSI
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San Rafael, CA 94901
415/454-7101
Section III

Information Resources, Inc.
200 Fifth Ave.
Waltham, MA 02154
617/890-1100
Section III, IV

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229 Millwell Dr.
Maryland Heights, MO 63043
314/291-7744
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Interviewing Service of America
16005 Sherman Way., #209
Van Nuys, CA 91406
818/989-1044
Fax 818/782-1309
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212/674-2323
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704/357-1961
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103 Washington St., Ste. 348
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Section III

Loon Valley Software
420 Summit Ave., #38
St. Paul, MN 55102-2699
612/227-5552 or 800/828-0136
Section II,III
(See Advertisement on Page 43)

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1200 Roosevelt Road
Glen Ellyn, IL 60137-6098
708/932-7000
Section IV

McCarthy Associates
5775 So. Bay Rd.
Clay, NY 13041
315/458-9320
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(See Advertisement on Page 64)

Mace, Inc.
2313 Center Ave.
Madison, WI 53703
608/241-4566
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Management Science Associates/
Market Science Associates
6565 Penn Ave. at 5th
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    212/398-9100

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Peoria, IL 61625
309/677-3299
Fax 309/677-3386
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Marketeam Associates
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St. Louis, MO 63146
314/878-7667
Section I, II
(See Advertisement on Page 35)

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906 University Place
Evanston, IL 60201
708/491-3885
Section III, IV

Marketing Metrics, Inc.
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Paramus, NJ 07652
201/599-0790
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Fax 609/924-0678
Section I,II, III,IV
(See Advertisement on Page 59)

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Ridgewood, NJ 07451
201/447-1395
Section II, III

Pulse Train Technology
62 Summit Avenue
Hackensack, NJ 07601
201/489-3003
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(See Advertisement Page 44)

Questar Data Systems, Inc.
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Fax 612/688-0546
Section I,II

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Statistical Innovations Inc.
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McCarthy Assoc.
Management Science Assoc.
Maritz Marketing Research
Marketeam Associates
Market Probe International
Mar-Rel Analytics
Matrix, Inc.
Microtab, Inc.
New Dimension Data Group
Nordhaus Research
Pine Company
Processing Consultants In Marketing
Quantime
Questar Data Systems
Eric Ramon
ReData, Inc.
SAS Institute, Inc.
Sigma Research
Sophisticated Data Research
Spencer Research
SPSS, Inc.
Stars, Inc.
STS, Inc.
Survey Analysis
T/C/A
Total Research Corporation
Viking Software Service
Walker: DataSource
Jan Werner Data Processing

DATA TABULATION
The Accutab Co.
Acquadata Entry Services
Analytical Computer Service, Inc.
Bolding Tab Service
Coffman Systems, Inc.
Computers For Marketing Corp.
Consulting, Hardware & Processing
Consumer Pulse, Inc.
Consumer & Professional Research
Coremat, Inc.
CRC Information Sys.
Creative Computer Services
Creative Research Systems
The Datafax Company
Data Lab Corp.
Datalogics
Datanetics
Data Probe/Datatab
Data Tabulation Service
DataTactics
Data Vision Research
Express Data
Hodges & Assoc.
International Data Corp.
Interviewing Service of America
R. Isaacs Computing Assoc.
KG Tabs
McCarthy Assoc.
Management Science Assoc.
M/A/R/C, Inc
Maritz Marketing Research
Marketeam Associates
Marketing Software, Inc.
Marketools, Inc.
Market Probe International
Mar-Rel Analytics
Matrix, Inc.
Microtab, Inc.
New Dimension Data Group
Nordhaus Research
Pine Company
Processing Consultants In Marketing
P-Stat, Inc.
Quantime
Questar Data Systems
Eric Ramon
ReData, Inc.
SAS Institute, Inc.
Sigma Research
Sophisticated Data Research
Spencer Research
SPSS, Inc.

Stars, Inc.
STS, Inc.
Suburban Associates
Survey Analysis
T/C/A
Total Research Corporation
Walker: DataSource
Jan Werner Data Processing

SECTION II
Statistical Analysis

ANALYTICAL COMPUTER SERVICE,INC.-Specializes in statistical analysis of research data including multivariate analysis.

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

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

DATALOGICS-Technical consulting including graphics services; multivariate analysis including conjoint analysis and perceptual mapping.

LOON VALLEY SOFTWARE-Custom programming for specific user needs. Specialize in custom interface for PC's(MS-DOS or Mac) to increase user efficiency. Programming capabilities include custom statistical analysis, database management, telecommunication, LAN design and user specified analysis routines.

McCARTHY ASSOCIATES-Full range of statistical analysis services available.

MARITZ MARKETING RESEARCH-Statistical analysis experience with most multivariate methods(ANOVA, regression, factor, cluster, conjoint, etc.), plus proprietary.

MARKET ACTION RESEARCH SOFTWARE-Correspondence analysis of any complex data; perceptual maps to present at meetings; scientific research reports in clear language; most leading research users around the world already use MapWise, presents complex research with one simple picture; specialty for over five years; flexible and fast service; proven best for relating categories with a graphic; professional format; competitive prices.

MARKETEAM ASSOCIATES-Full statistical capability including perceptual mapping, factor analysis, correspondence analysis, regression, etc. Staff includes Ph.D.'s.

QUANTIME-Offers full statistical analysis services. staff size: 75+ Years in business: 10

STATISTICAL ANALYSIS SERVICES
The Accutab Co.
Analytical Computer Service, Inc.
Analysis and Forecasting, Inc.
Analytical Consultants Int'l.
BMDP Statistical Software, Inc.
Coffman Systems, Inc.

Barry Cohen
Computers For Marketing Corp.
Concurrent Technologies Corp.
Consumer & Professional Research
Creative Research Systems
CRC Information Sys.
Data Lab Corp.
Datalogics
Datan, Inc.
Datanetics
Data Tabulating Service
DataTactics
Data Vision Research
Drews Programs
Dynacomp, Inc.
Fassino Associates
Hodges & Assoc.
Loon Valley Software
McCarthy Assoc.
Management Science Assoc.
Maritz Marketing Research
Market Action Research Software
Marketeam Associates
Marketing Software, Inc.
Market Probe International
Mar-Rel Analytics
Matrix, Inc.
National Decision Systems
National Planning Data Corp.
NCSS
Nordhaus Research
Pine Company
Pizzano & Co.
P-Stat, Inc.
Pulse Analytics
Quantime
Questar Data Systems
ReData, Inc.
Salinon Corp.
SAS Institute, Inc.
Significant Statistics
Slater Hall Information Products
Sophisticated Data Research
Spencer Research
Spring Systems
SPSS, Inc.
Statistical Innovations
STS, Inc.
Talmey Research, Inc.
Total Research Corporation
Tydac Technologies
Walker Research & Analysis
Jan Werner Data Processing

SECTION III

SOFTWARE PROGRAMS FOR USE WITH PC'S

ANALYTIC COMPUTERS SERVICE, INC.-ACS-QUERY: a network PC-based computer-aided telephone interviewing software system that allows you to create questionnaires, conduct interviews, list and sort open-ended responses, run marginal counts and one-by-one crosstabs as well as disposition reports and interviewer productivity reports. A-CROSS: easiest and most powerful PC crosstab program for survey and research data. Handles up to 16.8 million respondents with up to 9,999 variables/case. Produces professional quality tables as large as 30 columns by 104 stubs. Reads any ASCII column binary or dBase file as input. Outputs to all printers(including lasers), creates ASCII, and Lotus WKS files. Direct interface with most popular CRT/CATI systems to automatically build tables in A-CROSS. Full statistics including t-tests, Chi-squares. CROSLINK: The Ci2 to A-Cross link that creates and labels tables in A-Cross directly from Ci2 questionnaire files. QLINK: The ACS-QUERY to A-Cross bridge to auto-

matically create ACROSS tables from ACS-QUERY CATI system files. 2CROSS: The experienced user interface to allow external table creation to be used in A-Cross. Tables can be created in text editors, on mainframes, even imported from other crosstab programs to utilize the advantages of A-Cross or A-Cross Runtime. A-CROSS RUNTIME: Full A-Cross software customized for each job. Clients can access and run additional analyses on their data on their own PC.

BRETTON-CLARK-CONJOINT DESIGNER: Conjoint analyzer menu-driven software for the design and analysis of conjoint studies. Includes market simulator, data entry and cleaning, and graphics. Used by leading researchers since 1985. SIMGRAF: An adjusted market simulator allows one to calibrate results to current market conditions and allows one to forecast by individual market segment. BRIDGER: Allows one to do full profile conjoint studies using large numbers of product features. CONJOINT LINMAP: Advanced nonmetric conjoint analysis program produces globally optimum solutions and lets one constrain utility functions to increase predictive validity.

COMPUTERS FOR MARKETING CORPORATION- PC SURVENT: A complete system for conducting computer-assisted interviewing, whether stand-alone(malls) or networked(telephone centers). Users may write and administer questionnaires using complex logic conditions, lengthy response lists, etc. Network mode enables Supervisor monitoring, on-line quota control, and other telephone interviewing requirements. NANOPUNCH:Key-To-Disk data entry sys-

tem for IBM-PC's and compatibles. Designed to simulate the familiar IBM keypunch (including keyboard layout, use of "drum cards", etc.)for rapid, columnar-style data entry needs. Accepts single or multi-punched alpha, numeric, or alphanumeric data, fields, ranges, etc. EZWRITER: An easy way for non-experts to compose a questionnaire for computer interviewing-complete with skips, logic, numeric ranges, acceptable punches. Help screens are provided. Questions may be changed, deleted or added with no effort. PC-MENTOR: A batch crosstabulation/reporting system for PC's. Includes all industry-standard features(weighting, ranking, nets, etc.). Provides complete formatting flexibility. Utilities for cleaning and other data preparation requirements included. Fully integrated with PC-SURVENT for streamline tabulation of CRT studies. SURVEYOR: A menu-driven system that is self-taught. Questionnaires may be composed for CATI, print hardcopy, do data entry, perform simple tabs with some statistics, import and export files. Designed for companies that send interviewing to Field Services.

DATALOGICS-FUTREX® Conjoint/Trade-off System: Fully automatic operation including auto generation of paper & pencil questionnaires or CRT data capture. Choice simulator in 2 modes. Well documented. FxMAP® ImageMappingPlus: Generate perceptual maps from aggregate means right from the crosstabs OR by respondent. Computes IDEAL vector; generates 'Share of Ideal" and 'Share of Preference' by product. Simulate changes in perception on choice preference.
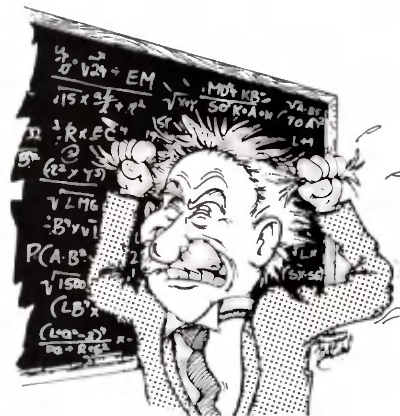
DIGISOFT COMPUTERS INC.-TELESCRIPT: Networked PC system for CRT interviewing, market research, sales and marketing and more. Directly interfaces with PC databases such as dBase, Rbase and Paradox. Flexible scripts include logic, branching, computations, quotas and multipunch fields. Complete administrative functions to assign and manage multiple jobs simultaneously, report all interviewer activity and more. Runs on all networks, including Novell, on 1-100 workstations.

ECF SYSTEMS DEVELOPMENT-FMS maintains databases on clients, jobs recruiters and respondents, consumers, medical and professional. Menu driven selection of respondents may be conducted on up to 60 demographics. In addition, the system tracks facility scheduling, client information and recruiter performance. FMS is available in either a stand-alone version or in a full network version. Currently in use in over 35 facilities.

LOON VALLEY SOFTWARE-FOREPROFIT: A complete analytic package for MS-DOS systems that combines time series analysis, exponential smoothing routines, multiple regression modeling, linear programming and exploratory data analysis. Selection menus provide on-screen help. Memory joggers illuminate the impact of each choice. $250.00 SOOTHSAYER: An easy-to-use data analyzer. It takes a series of numbers, then applies a sophisticated artificial intelligence algorithm to predict future outcome based on past history. The forecast includes contingency values and a plot of the result. No need to enter parameters. $69.00.

MARITZ MARKETING RESEARCH-EXPLORER: A database system for generating custom ad hoc crosstabulations with statistical testing. MARITZ STATS: PC-based statistical package. Performs ten significance tests on summary data and analyses frequency distributions. Sample size module calculates sample sizess and precisions for a variety of problems. Select-a-Stat module recommends appropriate statistical test for most situations. FREE for the asking.

MARKET ACTION RESEARCH SOFTWARE-Perceptual mapping of any complex data; correspondence analysis by plotting categories on two or three axes; multivariate analysis with one simple graphic, scientific trade secrets allow users to measure distances among and between all categories; distributors worldwide; easy sophistication; full version $495, trial version $9.95; free demo and free training with your own data; support in setting up and interpreting results.

P-STAT INC.-System runs on 8088/8086/80286/80386 PCs under DOS, Extended-DOS, XENIX and UNIX. The system is comprised of a Base Program, Advanced Statistics Module, and TABS(SURVEY stub-and-banner and Sample Balance Program) module. The PC version is functionally identical to the mini/mainframe/workstation version. P-STAT reads and writes dBase III files, SPSS/X/PC export files and ASCII files.

QUANTIME-QUANTUM.PC: Editing and correction facilities for Binary/ASCII data. Weighting types: sample balancing, pre/post, projections. Handles hierarchical (trailer/panel) data. Table output: multiple level ranking; row, column, total and cumulative percentages; rank numbers, indices; row/table manipulation; T/Z tests, P&G required stats. Supports Postscript and standard laser printers. Interfaces with Quanquest, Quanvert and Quancept. Available on Multi-User 80386, and 640K MS-DOS PCs. QUANVERT: Interactive data analysis for researchers. Tabulates any question (variable) in the database by any other in many alphabets. Filter tables on any answer or combination of answers from exsisting questions. Weighted or unweighted output. Creates new variables by combining / splitting parts of existing questions. Handles multiple projects simultaneously. Interfaces with Quantum. Available on Multi-User 80386, and 640K MS-DOS PCs QUANQUEST: Interactive questionnaire design system. Uses color windows and menus. Stores questions, groups of questions and entire questionnaires for use with new questionnaires. User enters text of questions and responses. Handles skip patterns and grid questions. Automatically assigns column and punches, generates printed questionnaire, CATI script, editing and tabulation specs. Interfaces with Quantum and Quancept. Available on 640K MS-DOS PCs. QUANCEPT PC: CRT Interviewing System.

Handles very large and complex questionnaires. Significant features are telephone number management, quota control, computer assisted coding, interviewer monitoring, and interactive topline tabs. All user definable. Generates printed questionnaire and tabulation specs from script. Predictive-dialer interface available. Interfaces with Quanquest and Quantum. Available on Multi-User 80386 (up to 32 users) Can be used as CAPI system on 640K MS-DOS PCs. QUINPUT: Streamlined define and punch data entry system. Features: menu driven real time data checking from user-defined data mask includes full range of mathematic and logic operators. Punch program features automatic code conversion, code and number repeat, column counting and delete functions. Full verification. Quinput requires no technical training. Output in quantum or plain text format. Available in DOS and Xenix.

SAWTOOTH SOFTWARE, INC.-Ci2 SYSTEM: Creates and administers questionnaires using IBM PCUs and compatibles. Writer controls questions type, skip patterns, randomization, acceptable responses and screen colors. Results analyzed using any crosstab or statistical software. Links to conjoint or perceptual mapping. ADAPTIVE CONJOINT ANALYSIS SYSTEM: Used to design products and services or answer strategic marketing questions. Includes all software needed to set up computer administered questionnaire, obtain respondent trade-offs and simulate the impact of new or redesigned products. Runs on IBM PC's or compatibles. ADAPTIVE PERCEPTUAL MAPPING SYSTEM: Used to understand how products or services compare to their competitors on image-related issues. System offers capability to simulate market response to changes in product image. Includes computer administered questionnaire, discriminant analyzer, map plotting and simulator. Runs on IBM PC's or compatibles. Ci2 CATI SYSTEM: Computer-aided interviewing system using IBM PC's and compatibles connected by local area network. Offers automatic call management, auto-dialing, quota control, disposition monitoring and interviewer productivity reporting. Generate sample manually, household +1, randomly, or transfer from Survey Sampling disks. For 6-60 interviewing stations. Controls 24 studies simultaneously. CONVERGENT CLUSTER ANALYSIS SYSTEM: PC-based software for grouping survey respondents with similar characteristics into identifiable "clusters" for strategic target marketing. Market segments based on demographics, product preferences, or other variables can be identified easily and dependably using CCA. CCA can use data from any source, but it is particularly easy to use with data from Sawtooth Software products.

SPSS, INC.-SPSS/PC+: An interactive menu-driven management , analysis and presentation package. It features automatic error-checking, extensive on-line help, and the ability to read and write ASCII files for the easy exchange of data with other microcomputer packages. Statistical routines range from simple descriptive measures and crosstabulation tables to regression analysis. Data management facilities allow for selectingg, sorting, and weighting cases, merging multiple files, data aggregation and creating new variables.

STATPAC INC.- STATPAC GOLD: Was developed in 1979 as the first microcomputer research package and has continued to evolve since that time. The software is a complete survey and marketing research package with components ranging from sample selection, questionnaire design, on-line interviewing, tabs and statistical analysis, and forecasting. StatPac Gold is easy to learn, and will accomodate both large and small surveys.

WALONICK ASSOCIATES: (See StatPac Inc.)

ANALYSIS OF VARIANCE

Ashton-Tate
CACI
Concurrent Technologies Corp.
Creative Research Systems
Crunch Software Corp.
Cybernetic Solutions Co.
Derby Micro-Computer
Drews Programs
Dynacomp
Fassino Assoc.
Mace, Inc.
Maritz Marketing Research
Mar-Rel Analytics
Microtab, Inc.
NCSS
Penton Software
P-Stat, Inc.
SAS Institute
Spring Systems
SPSS, Inc.
StatPac Inc.
STSC
Systat, Inc.
Vision Base
Walonick Associates

BRAND SHARE ANALYSIS

Analytical Computer Service.
Ashton-Tate
CACI
Datalogics
Datamap, Inc.
Dynacomp, Inc.
Fassino Assoc.
Focus Research Systems
Geographic Data Tech.
Information Resources, Inc.
Management Science Assoc.
Marketing Software, Inc.
National Decision Systems
The Sachs Group
SAS Institute, Inc.
Spring Systems
SPSS, Inc.
StatPac Inc.
T/C/A
Walonick Associates

CANONICAL ANALYSIS

Dynacomp
Fassino Assoc.
Market Action Research Software
NCSS
P-Stat, Inc.
SAS Institute, Inc.
Spring Systems
SPSS, Inc.
StatPac, Inc.
STSC
Systat, Inc.
Walonick Associates

CENSUS REPORTING PROGRAMS

Analytical Computer Service
CACI
Claritas Corp.
Datamap, Inc.
Donnelley Marketing Information
Geographic Data Tech.
National Decision Systems
Sammamish Data Systems
SAS Institute, Inc.
Slater Hall Information Products
SPSS, Inc.
StatPac, Inc.
Strategic Mapping, Inc.
U.S.Statistics
Walonick Associates

CLUSTER ANALYSIS

CACI
Claritas Corp.
Datamap. Inc.
Dynacomp
Fassino Assoc.
Geographic Data Tech.
Mace, Inc.
MapInfo Corp.
Market Action Research Software
NCSS
P-Stat, Inc.
SAS Institute, Inc.
Sawtooth Software
Spring Systems
SPSS, Inc.
StatPac, Inc.
STSC
Systat, Inc.
Walonick Associates

COMPREHENSIVE STATISTICAL PACKAGES

Ashton-Tate
BMDP Statistical Software
Concurrent Technologies Corp.
Crunch Software Corp.
Cybernetic Solutions Co.
Dynacomp
Fassino Assoc.
Mace, Inc.
Marketing Software, Inc.
NCSS
P-Stat, Inc.
SAS Institute
The Scientific Press
Spring Systems
SPSS, Inc.
StatPac, Inc.
STSC
Systat, Inc.
Vision Base
Walonick Associates

COMPUTER CODING

Computers For Marketing Corp.
Cybernetic Solutions Co.
Datamap, Inc.
Datanetics
Derby Micro-computer
Detail Technologies, Inc.
Downie-Pine Company
StatPac, Inc.
T/C/A
Walonick Associates

COMPUTER GRAPHICS

Ashton-Tate
CACI
Datamap, Inc.
Datanetics
Donnelly Marketing Information
Downie-Pine Company
Drews Programs
Dynacomp
Ferox
Hawthorne Software Co.
Information Resources, Inc.
Loon Valley Software
Management Science Assoc.
MapInfo Corp.
Market Action Research Software
NCSS
National Decision Systems
P-Stat, Inc.
The Sachs Group
Sammamish Data Systems
SAS Institute
Spring Systems
SPSS, Inc.
StatPac, Inc.

STSC
Systat, Inc.
Tydac Technologies
Vision Base
Walonick Associates

COMPUTERIZED INTERVIEWING

Analytical Computer Service, Inc.
Computers For Marketing Corp.
Creative Research Systems
Cybernetic Solutions Co.
Datanetics
Digisoft Computers Inc.
Dynacomp
M/A/R/C, Inc.
Market Probe International
Quantime
Sawtooth Software
The Scientific Press
Software Science Inc.
StatPac, Inc.
Walonick Associates

CONJOINT/TRADE OFF ANALYSIS

Ashton-Tate
Bretton-Clark
Datalogics
Fassino Assoc.
Information Resources, Inc.
SAS Institute, Inc.
Sawtooth Software
SPSS, Inc.
StatPac, Inc.
Walonick Associates

CORRESPONDENCE ANALYSIS

Datamap, Inc.
Market Action Research Software
NCSS
SAS Institute, Inc.
SPSS, Inc.
StatPac, Inc.
Walonick Associates

CROSSTABULATION/ DISPLAY

Acquadata Entry Services
Analysis Technology, Inc.
Analytical Computer Service
Ashton-Tate
Business Research & Surveys
CACI
Computers For Marketing Corp.
Concurrent Marketing Sys.
Consulting, Hardware & Processing
Creative Research Systems
Crunch Software Corp.
Cybernetic Solutions Co.
Datamap, Inc.
Datanetics
Derby Micro-computer
Downie-Pine Company
Dynacomp
FacFind, Inc.
Information Resources, Inc.
Mace, Inc.
M/A/R/C, Inc.
Maritz Marketing Research
Market Action Research Software
Marketing Software, Inc.
Matrix, Inc.
Microtab, Inc.
NCSS
E.F. Paynter & Assoc.
P-Stat, Inc.
Quantime

The Sachs Group
SAS Institute
Sigma Research
Spring Systems
SPSS, Inc.
StatPac, Inc.
Stolzberg Research
STSC
Suburban Associates
SurveyTab
Systat, Inc.
T/C/A
Vision Base
Walonick Associates
Jan Werner Data Processing

CRT DATA ENTRY

Computers For Marketing Corp.
Concurrent Marketing Sys.
Creative Research Systems
Crunch Software Corp.
Cybernetic Solutions Co.
Datanetics
Downie-Pine Company
M/A/R/C, Inc.
Marketing Information Sys.
Mar-Rel Analytics
Matrix, Inc.
Microtab, Inc.
E.F. Paynter & Assoc.
Pros & Cons, Inc.
Quantime
Sigma Research
SPSS, Inc.
StatPac, Inc.
STSC
Systat, Inc.
Walonick Associates

CRT TELEPHONE INTERVIEWING

Analytical Computer Service, Inc.
Computers For Marketing Corp.
Creative Research Systems
Cybernetic Solutions Co.
Datanetics
Digisoft Computers
M/A/R/C, Inc.
E.F. Paynter & Assoc.
Pulse Train Technology
Quantime
Sawtooth Software
Sigma Research
Software Science, Inc.
StatPac, Inc.
Walonick Assoc.

DATABASE MANAGEMENT PROGRAMS

Analytical Computer Service
Computers For Marketing Corp.
Crunch Software Corp.
Cybernetic Solutions Co.
Datanetics
Detail Technologies Inc.
Dynacomp
Information Resources, Inc.
Leadtrack
Leibowitz Market Research Assoc.
Management Science Assoc.
Market Power, Inc.
Marketing Information Sys.
Matrix, Inc.
P-Stat, Inc.
The Sachs Group
Sales & Marketing Sys.
SAS Institute, Inc.
Software Science, Inc.
Spring Systems
SPSS, Inc.
StatPac, Inc.
Suburban Associates

U.S. Statistics
Walonick Associates

DATA EDITING

Acquadata Entry Services
Business Research & Survey
Concurrent Marketing Systems
Consulting, Hardware & Processing
Creative Research Systems
Crunch Software Corp.
Cybernetics Solutions Co.
Datanetics
Derby Micro-Computer
Detail Technologies, Inc.
Downie-Pine Company
Dynacomp
Loon Valley Software
Marketing Software, Inc.
Mar-Rel Analytics
Mastersoft, Inc.
Matrix, Inc.
Microtab, Inc.
NCSS
E.F. Paynter & Assoc.
P-Stat, Inc.
Quantime
The Sachs Group
SAS Institute
Smart Software
Spring Systems
SPSS, Inc.
StatPac, Inc.
STSC
Systat, Inc.
T/C/A
Vision Base
Walonick Associates
Jan Werner Data Processing

DATA ENTRY

Acquadata Entry Services
Adapt, Inc.
Business Research & Surveys
Computers For Marketing Corp.
Concurrent Marketing Sys.
Creative Research Systems
Crunch Software Corp.
Cybernetic Solutions Co.
Datanetics
Derby Micro-Computer
Detail Technologies, Inc.
DigData Entry System
Downie-Pine Company
Hodges & Assoc.
Loon Valley Software
M/A/R/C, Inc.
Marketing Software, Inc.
Mar-Rel Analytics
Mastersoft, Inc.
Matrix, Inc.
Microtab, Inc.
NCSS
E.F. Paynter & Assoc.
Pros & Cons, Inc.
P-Stat, Inc.
Pulse Train Technology
Quantime
SAS Institute
Spring Systems
SPSS, Inc.
StatPac, Inc.
STSC
Suburban Associates
Systat, Inc.
Viking Software
Vision Base
Walonick Associates
Jan Werner Data Processing

DEMOGRAPHIC ANALYSIS

Analytical Computer Service
Ashton-Tate
Baxter Marketing Svces.
CACI
Claritas Corp.

Creative Research Systems
Crunch Software Corp.
Cybernetic Solutions Co.
Datamap, Inc.
Donnelley Marketing Information
Dynacomp
Fassino Assoc.
Focus Research Systems
Geographic Data Tech.
Information Resources, Inc.
Management Science Assoc.
MapInfo Corp.
Market Action Research Software
Marketing Software, Inc.
Market Share Modeling
Microtab, Inc.
National Decision Systems
P-Stat, Inc.
The Sachs Group
Sales & Marketing Sys.
Sammamish Data Systems
SAS Institute, Inc.
Slater Hall Information Products
SPSS, Inc.
StatPac, Inc.
Strategic Mapping, Inc.
T/C/A
Tydac Technologies
U.S. Statistics
Walonick Associates

DISCRIMINANT ANALYSIS

Datamap, Inc.
Dynacomp
Fassino Assoc.
Mace, Inc.
NCSS
P-Stat, Inc.
SAS Institute
Sawtooth Software
Spring Systems
SPSS, Inc.
Statistical Innovations
StatPac, Inc.
STSC
Systat, Inc.
Walonick Associates

EXPERIMENTAL DESIGN THEORY

Bretton-Clark
Barry Cohen
Dynacomp
NCSS
SAS Institute, Inc.
Spring Systems
SPSS, Inc.
STSC

FACTOR ANALYSIS/ PRINCIPAL COMPONENTS

Ashton-Tate
Crunch Software Corp.
Dynacomp
Fassino Assoc.
Mace, Inc.
Matrix, Inc.
NCSS
P-Stat, Inc.
Spring Systems
SPSS, Inc.
StatPac, Inc.
STSC
Systat, Inc.
Walonick Associates

FOCUS GROUP MANAGEMENT

Decision Support Inc.
ECF Systems Development
Sophisticated Data Research

GENERATION/BALANCED SAMPLING DESIGN

Detail Technologies, Inc.
Dynacomp
Hodges & Assoc.
NCSS
P-Stat, Inc.
STSC

GEOGRAPHIC INFORMATION SERVICES

Analytical Computer Service
CACI
Claritas Corp.
Datamap, Inc.
Geographic Data Technology
MapInfo Corp.
National Decision Systems
National Planning Data Corp.
The Sachs Group
Tydac Technologies
U.S. Statistics

GRAPHIC DISPLAY

Ashton-Tate
CACI
Creative Research Systems
Datamap, Inc.
Downie-Pine Company
Drews Programs
Dynacomp
Enertronics
Focus Research Systems
Hawthorne Software Co.
IMSI
MapInfo Corp.
Market Action Research Software
NCSS
P-Stat, Inc.
The Sachs Group
Spring Systems
SPSS, Inc.
StatPac, Inc.
STSC
Systat, Inc.
Vision Base
Walonick Associates

INDEXING

Mastersoft, Inc.
National Decision Systems
T/C/A
Jan Werner Data Processing

INTERACTION/ CLASSIFICATION ANALYSIS

Analytical Computer Service
Ashton-Tate
Datamap, Inc.
Market Action Research Software
SPSS, Inc.
Statistical Innovation
StatPac, Inc.
STSC
Walonick Associates

INTERACTIVE TABULATION

Analytical Computer Service
Business Research & Surveys
Creative Research System
Crunch Software Corp.
Cybernetic Solutions Co.
Datamap, Inc.
Datanetics
Downie-Pine Company
Fassino Assoc.
Information Resources, Inc.

Maritz Marketing Research
Matrix, Inc.
Microtab, Inc.
Quantime
The Sachs Group
SAS Institute, Inc.
Spring Systems
SPSS, Inc.
StatPac, Inc.
STSC
Walonick Associates

KEY TO DISK

Adapt, Inc.
Computers For Marketing Corp.
Creative Research System
Crunch Software Co.
Cybernetic Solutions Co.
Datanetics
Detail Technologies, Inc.
Downie-Pine Company
Matrix, Inc.
Microtab, Inc.
E.F. Paynter & Assoc.
Pros & Cons, Inc.
StatPac, Inc.
Walonick Associates

LOGIT/LINEAR ANALYSIS

Conciurrent Technologies Corp.
Dynacomp
Fassino Assoc.
Loon Valley Software
SAS Institute
Spring Systems
SPSS, Inc.
Statistical Innovations
StatPac, Inc.
STSC
Systat, Inc.
Walonick Associates

MARKET MATCHING

Analytical Computer Service
CACI
Claritas Corp.
MapInfo Corp.
Market Action Research Software
National Decision Systems
Successware

MARKET SEGMENTATION

Analytical Computer Service
Ashton-Tate
CACI
Claritas Corp.
Datamap, Inc.
Decision Support Inc.
Donnelley Marketing Information
Fassino Assoc.
Focus Research Systems
Geographic Data Tech.
Leadtrack
M/A/R/C Inc.
Market Action Research Software
Marketing Software, Inc.
National Decision Systems
Pulse Analytics
The Sachs Group
Sawtooth Software
Spring Systems
SPSS, Inc.
Statistical Innovations
StatPac, Inc.
Successware
U.S. Statistics
Walonick Associates

MEDIA ANALYSIS

Analytical Computer Service
CACI
Claritas Corp.
Cybernetic Solutions Corp.

Datamap, Inc.
Decision Support, Inc.
Donnelley Marketing Information
Geographic Data Tech.
Leadtrack
Market Action Research Software
Market Power, Inc.
National Decision Systems
The Sachs Group
SAS Institute, Inc.
Spring Systems
SPSS, Inc.
StatPac, Inc.
T/C/A
Walonick Associates

MULTIDIMENSIONAL SCALING

Datalogics
Dynacomp
Fassino Assoc.
Mace, Inc.
Market Action Research Software
NCSS
Spring Systems
SPSS, Inc.
Systat, Inc.

MULTINOMINAL LOGIT ANALYSIS

Caliper Corporation
Dynacomp
Fassino Assoc.
Mace, Inc.
SAS Institute, Inc.
Statistical Innovations
StatPac, Inc.
Walonick Assoc.

MULTIVARIABLE METHODS

Business Forecast Systems
Concurrent Technologies Corp.
Dynacomp
Datalogics
Fassino Assoc.
Mace, Inc.
Market Action Research Software
NCSS
P-Stat, Inc.
SAS Institute
Sawtooth Software
Smart Software
Spring Systems
SPSS, Inc.
StatPac, Inc.
STSC
Systat, Inc.
Vision Base
Walonick Associates

NAME GENERATION

Salinon Corporation

NON-PARAMETRIC STATISTICS

Analytical Computer Service
Ashton-Tate
Business Forecast Systems
Crunch Software Corp.
Dynacomp
Fassino Assoc.
Market Action Research Software
Mar-Rel Analytics
NCSS
P-Stat, Inc.
SAS Institute

Spring Systems
SPSS, Inc.
StatPac, Inc.
STSC
Systat, Inc.
Walonick Associates

ON-LINE DATA TABULATION

CACI
Cybernetic Solutions Co.
Datanetics
Downie-Pine Company
Focus Research Systems
M/A/R/C Inc.
Matrix, Inc.
Microtab, Inc.
E.F. Paynter & Assoc.
P-Stat, Inc.
Quantime
SAS Institute, Inc.
Spring Systems
SPSS, Inc.
StatPac, Inc.
Walonick Associates
Jan Werner Data Processing

ON-LINE TELEPHONE INTERVIEWING

Computers For Marketing Corp.
Concurrent Marketing Sys.
Cybernetic Solutions Co.
Datanetics
M/A/R/C Inc.
Marketing Information Sys.
Market Power, Inc.
E.F. Paynter & Assoc.
Quantime
Sawtooth Software
The Scientific Press
StatPac, Inc.
Walonick Associates

PATTERN ANALYSIS

Analytical Computer Service
Ashton-Tate
Concurrent Technologies Co.
Datamap, Inc.
Dynacomp
Market Action Research Software
Marketools, Inc.
SAS institute, Inc.
Spring Systems
Systat, Inc.
U.S. Statistics

PERCEPTUAL MAPPING

Ashton-Tate
CACI
Datalogics
Datamap, Inc.
Dynacomp
Fassino Assoc.
Geographic Data Tech.
Hawthorne Software Co.
Market Action Research Software
National Decision Systems
SAS Institute, Inc.
Sawtooth Software
Spring Systems
SPSS, Inc.
StatPac, Inc.
Walonick Associates

PRICE ELASTICITY MEASUREMENT

Analytical Computer Service
Ashton-Tate
Bretton-Clark

Concurrent Technologies Corp.
Datalogics
Fassino Assoc.
Loon Valley Software
Management Science Assoc.
Marketools, Inc.
Pizzano & Co.
SAS Institute, Inc.
Sawtooth Software
Spring Systems
Vision Base

PROGRAMMING LANGUAGE

Crunch Software Corp.
Datanetics
Detail Technologies, Inc.
Fassino Associates
SAS Institute, Inc.
Software Science, Inc.
StatPac, Inc.
STSC
Walonick Associates

QUADRANT ANALYSIS

Ashton-Tate
Fassino Assoc.
Pulse Analytics
SAS Institute, Inc.
Spring Systems
T/C/A

QUESTIONNAIRE DESIGN LANGUAGE

Computers For Marketing Corp.
Cybernetic Solutions Coo.
Datanetics
Downie-Pine Company
Dynacomp
Hodges & Assoc.
E.F. Paynter & Assoc.
Quantime
StatPac, Inc.
Walonick Assoc.

RANKING

Analytical Computer Service
Business Research & Surveys
CACI
Computers For Marketing Corp.
Creative Research System
Crunch Software Corp.
Cybernetic Solutions Co.
Decision Support, Inc.
Downie-Pine Company
Dynacomp
Focus Research Systems
Mace, Inc.
M/A/R/C Inc.
Marketools, Inc.
Microtab, Inc.
NCSS
P-Stat, Inc.
Pulse Train Technology
Quantime
SAS Institute
Spring Systems
SPSS, Inc.
StatPac, Inc.
STSC
Systat, Inc.
T/C/A
Walonick Associates
Jan Werner Data Processing

REGRESSION/ CORRELATION ANALYSIS

Ashton-Tate
Business Forecast Systems

CACI
Concurrent Technologies Corp.
Creative Research System
Crunch Software Corp.
Derby Micro-Computer
Drews Programs
Dynacomp
Fassino Assoc.
Information Resources, Inc.
Loon Valley Software
Mace, Inc.
Marketools, Inc.
Mar-Rel Analytics
NCSS
P-Stat, Inc.
SAS Institute
Spring Systems
SPSS, Inc.
StatPac, Inc.
STSC
Systat, Inc.
TMS Systems
Walonick Associates

SALES ANALYSIS

Analytical Computer Service
Ashton-Tate
Baxter Marketing Services
CACI
Claritas Corp.
Computers For Marketing Corp.
Concurrent Technologies Corp.
Crunch Software Corp.
Datamap, Inc.
Datanetics
Decision Support, Inc.
Detail Technologies, Inc.
Dynacomp
Ferox
Focus Research Systems
Geographic Data Tech.
Hawthorne Software Co.
Leadtrack
MapInfo. Corp.
Market Action Research Software
Marketing Information Sys.
Marketing Software, Inc.
Market Power, Inc.
Marketools, Inc.
National Decision Systems
P-Stat, Inc.
The Sachs Group
Sales & Marketing Sys.
Sammamish Data Systems
SAS Institute
Snap Software, Inc.
Spring Systems
SPSS, Inc.
StatPac, Inc.
Successware
TMS Systems
Tydac Technologies
Vision Base
Walonick Associates

SALES DATABASE

Ashton-Tate
CACI
Computer Strategies, Inc.
Crunch Software Corp.
Datamap, Inc.
Datanetics
Dynacomp
Information Resources, Inc.
Leadtrack
Marketing Information Sys.
Market Power, Inc.
The Sachs Group
Sales & Marketing Sys.
SAS Institute, Inc.
StatPac, Inc.
Walonick Associates
XYCAD Group

SALES EFFECTIVENESS MEASUREMENT

Analytical Computer Service
Ashton-Tate
Baxter Marketing Services
CACI
Datamap, Inc.
Decision Support, Inc.
Focus Research Systems
Leadtrack
Marketing Information Sys.
Marketing Software, Inc.
Market Power, Inc.
National Decision Systems
Sales & Marketing Sys.
SPSS, Inc.
StatPac, Inc.
Successware
Walonick Associates

SALES FORECASTING

Baxter Marketing Services
Business Forecast System
CACI
Concurrent Technologies Corp.
Crunch Software Corp.
Datamap, Inc.
Decision Support, Inc.
Dynacomp
Fassino Assoc.
Ferox
Focus Research Systems
Geographic Data Tech.
Leadtrack
Levenbach Assoc.
Loon Valley Software
Marketools, Inc.
Marketing Information Sys.
Market Share Modeling
Market Power, Inc.
National Decision Systems
NCSS
Pizzano & Co.
P-Stat, Inc.
The Sachs Group
Sales & Marketing Sys.
SAS Institute
Smart Software
Spar/Burgoyne
Spring Systems
SPSS, Inc.
StatPac, Inc.
Strategic Marketing Resources
STSC
TMS Systems
U.S. Statistics
Vision Base
Walonick Associates
XYCAD Group

SAMPLE SIZE DETERMINATION

Barry Cohen
Creative Research Systems
Detail Technologies, Inc.
Dynacomp
Fassino Assoc.
Hodges & Assoc.
Maritz Marketing Research
NCSS
SAS Institute, Inc.
StatPac, Inc.
Strategic Marketing Resources
STSC
Walonick Associates

SAMPLE WEIGHTING

Analytical Computer Service
Ashton-Tate
Business Research & Surveys
Computers For Marketing Corp.
Creative Research System
Cybernetic Solutions Corp.
Derby Micro-Computer

Detail Technologies, Inc.
Downie-Pine Company
Matrix, Inc.
Microtab, Inc.
E.F. Paynter & Assoc.
P-Stat, Inc.
Quantime
SAS Institute, Inc.
SPSS, Inc.
StatPac, Inc.
STSC
T/C/A
Walonick Associates

SIMULATION/MODELING

Bretton-Clark
Business Forecast Systems
Concurrent Technologies
Datamap, Inc.
Decision Support, Inc.
Dynacomp
Fassino Assoc.
Ferox
Management Science Assoc.
Market Action Research Software
Mar-Rel Analytics
The Sachs Group
SAS Institute, Inc.
Sawtooth Software
SDG Decision Systems
Spring Systems
SPSS, Inc.
StatPac, Inc.
TMS Systems.
Walonick Associates

SITE EVALUATION

Analytical Computer Service
CACI
Claritas Corp.
Datamap, Inc.
Decision Support, Inc.
Donnelley Marketing Information
Geographic Data Tech.
MapInfo Corp.
National Decision Systems
The Sachs Group
StatPac, Inc.
Tydac Technologies
U.S. Statistics
Walonick Associates

'T' TEST

Analytical Computer Service
Business Research & Services
Barry Cohen
Computers For Marketing Corp.
Concurrent Technologies Corp.
Creative Research System
Crunch Software Corp.
Cybernetic Solutions Co.
Detail Technologies, Inc.
Downie-Pine Company
Dynacomp
Fassino Assoc.
Loon Valley Software
Mace, Inc.
M/A/R/C Inc.
Maritz Marketing Research
Marketing Software, Inc.
Mar-Rel Analytics
Matrix, Inc.
Microtab, Inc.
NCSS
P-Stat, Inc.
Quantime
SAS Institute
Spring Systems
SPSS, Inc.
StatPac, Inc.
STSC
Systat, Inc.
T/C/A
Vision Base
Walonick Associates
Jan Werner Data Processing

TABLE EDITING

Analytical Computer Service
Computers For Marketing Corp.
Concurrent Marketing Systems
Datalogics
Downie-Pine Company
Matrix, Inc.
Microtab, Inc.
P-Stat, Inc.
Quantime
The Sachs Group
Spring Systems
SPSS, Inc.
StatPac, Inc.
STSC
T/C/A
Vision Base
Walonick Associates
Jan Werner Data Processing

TABULATION SYSTEM

Analytical Computer Service
Business Research & Surveys
Computers For Marketing Corp.
Concurrent Marketing Systems
Consulting, Hardware & Processing
Creative Research System
Crunch Software Corp.
Cybernetic Solutions Corp.
Datamap, Inc.
Datanetics
Derby Micro-Computer
Downie-Pine Company
Management Science Assoc.
M/A/R/C Inc.
Marketing Software, Inc.
Market Probe, IntUI
Matrix, Inc.
Microtab, Inc.
E.F. Paynter & Assoc.
P-Stat, Inc.
Pulse Train Technology
Quantime
SAS Institute, Inc.
Sigma Research
Spring Systems
SPSS, Inc.
Stolzberg Research
StatPac, Inc.
Suburban Associates
T/C/A
Walonick Associates
Jan Werner Data Processing

TELEPHONE INTERVIEWING/ SAMPLING

Analytical Computer Service, Inc.
Computers For Marketing Corp.
Creative Research System
Cybernetic Solutions Corp.
Digisoft Computers, Inc.
Hodges & Assoc.
M/A/R/C Inc.
Marketing System Group
E.F. Paynter & Assoc.
Pulse Train Technology
Quantime
Sawtooth Software
The Scientific Press
StatPac, Inc.
Walonick Associates

THURSTONE SCALING

Fassino Assoc.
Systat, Inc.

TIME-SERIES ANALYSIS

Concurrent Technologies Corp.
Dynacomp

Fassino Assoc.
Focus Research Systems
Loon Valley Software
Marketools, Inc.
Mar-Rel Analytics
NCSS
SAS Institute, Inc.
Smart Software
Spring Systems
SPSS, Inc.
StatPac, Inc.
STSC
Systat, Inc.
TMS Systems
U.S. Statistics
Vision Base
Walonick Associates

TRANSLATION

Analytical Computer Service
Detail Technologies

UPC SCANNERS

Information Resources, Inc.
StatPac, Inc.
Walonick Associates

VERBATIM CODING

Computers For Marketing Corp.
Creative Research System
Cybernetic Solutions Corp.
Detail Technologies
Downie-Pine Company
M/A/R/C Inc.
Marketing Metrics, Inc.
Sigma Research
StatPac, Inc.
Walonick Associates

VOLUMETRIC ANALYSIS

Analytical Computer Service
Datamap, Inc.
Management Science Assoc.
Microtab, Inc.
Quantime
SAS Institute, Inc.
SPSS, Inc.
T/C/A

SECTION IV

SOFWARE PROGRAMS FOR USE WITH MAINFRAMES

ANALYTICAL COMPUTER SERVICE-RESQUE: A flexible and efficient computer system designed for processing survey data. Priovides final tables and full range of statistical computations.

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

P-STAT INC.-Runs on UNIX platforms (Motorols 680xx and 88000, Intel 80386/80486, SPARC and MIPS based), and a variety of mini/mainframe computers(IBM, DEC, NCR, PRIME, etc.) running proprietary operating systems. P-STAT is supported on over 50 different hardware systems and is functionally identical from a PC to an IBM mainframe.

QUANTIME- QUANTUM: Editing and correction facilities for Binary/ASCII data. Weighting types: sample balancing, pre/post, projections. Handles hierarchical (trailer/panel) data. Table output: multiple level ranking; row, column, total and cumulative percentages; rank numbers, indices; row/table manipulation; T/Z tests, P&G required stats. Supports Postscript and standard laser printers. Interfaces with Quanquest, Quanvert and Quancept. Available on Multi-User 80386, IBM CMS/MVS, DEC VMS, UNIX machines. QUANVERT: Interactive data analysis for researchers and executives. Tabulates any question (variable) in the database by any other. Filter tables on any answer or combination of answers from exsisting questions. Weighted or unweighted output. Creates new variables by combining /splitting parts of existing questions. Handles multiple projects simultaneously. Interfaces with Quantum. Available on Multi-User 80386, IBM CMS/MVS, DEC VMS, UNIX machines. QUANCEPT MINI: CRT Interviewing System. Handles very large and complex questionnaires. Significant features are telephone number management, quota control, computer assisted coding, interviewer monitoring, and interactive topline tabs. All user-definable. Generates printed questionnaire and tabulation specs from script. Predictive-dialer interface available.Interfaces with Quanquest and Quantum. Available on Multi-User 80386 (up to 32 users), DEC VAX, and other UNIX machines. QUINPUT: Streamlined define and punch data entry system. Features: menu driven real time data checking from user-defined data mask includes full range of mathematic and logic operators. Punch program features automatic code conversion, code and number repeat, column counting and delete functions. Full verification. Quinput requires no technical training. Output in quantum or plain text format. Available in DOS and Xenix.

SPSS, INC.-Data analysis system provides integrated procedures for statistical data analysis, data management and report writing. It contains over 50 statistical routines from cross tabulations and descriptives to multivariate analysis techniques, including regression. Available options include SPSS Categories for conjoint analysis; and SPSS Tables for producing high-quality stub-and-banner tables.

ANALYSIS OF VARIANCE

Coffman Systems, Inc.
Computer Associates
Concurrent Technologies Corp.
CRC Information Sys.
Information Resources, Inc.
P-Stat, Inc.
SAS Institute
SPSS, Inc.

BRAND SHARE ANALYSIS

Coffman Systems, Inc.
Computer Associates
SAS Institute, Inc.
SPSS, Inc.
T/C/A

CANONICAL ANALYSIS

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

CENSUS REPORTING PROGRAMS

SAS Institute
SPSS, Inc.
U.S. Statistics

CLUSTER ANALYSIS

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

COMPREHENSIVE STATISTICAL PACKAGE

BMDP Statistical Software
Computer Associate
Concurrent Technologies Corp.
CRC Information Sys.
Information Resources, Inc.
P-Stat, Inc.
SAS Institute
SPSS, Inc.

COMPUTER CODING

Computers For Marketing Corp.
Downie-Pine Company
Mitchell Management Sys.

COMPUTER GRAPHICS

Computer Associates
Downie-Pine Company
Devcom Mid-America
Information Resources, Inc.
P-Stat, Inc.
SAS Institute
SPSS, Inc.

COMPUTERIZED INTERVIEWING

Coffman Systems, Inc.
Computers For Marketing Corp.
CRC Information Sys.
Quantime

CONJOINT/TRADE-OFF ANALYSIS

Computer Associates
CRC Information Sys.
Information Resources, Inc.
Allan Shocker
SAS Institute, Inc.
SPSS, Inc.

CORRESPONDENCE ANALYSIS

Computer Associates
CRC Information Sys.
Mitchell Management Sys.
SPSS, Inc.

CROSSTABULATION/ DISPLAY

Analytical Computer Service, Inc.
Britz Publishing Co.

Coffman Systems, Inc.
Computer Associates
Computers For Marketing Corp.
Consulting, Hardware & Processing
CRC Information Sys.
Downie-Pine Company
Information Resources, Inc.
Market Probe International
Matrix, Inc.
Mitchell Management Sys.
Perreault & Assoc.
P-Stat, Inc.
Quantime
SAS Institute
Sigma Research
SPSS, inc.
Systat, Inc.

CRT DATA ENTRY

Coffman Systems, Inc.
Computers For Marketing Corp.
Devcom Mid-America
Downie-Pine Company
M/A/R/C Inc.
Marketing Info. Systems
Mitchell Management Sys.
Quantime
SPSS, inc.

CRT TELEPHONE INTERVIEWING

Coffman Systems, Inc.
Computers For Marketing Corp.
CRC Information Sys.
M/A/R/C Inc.
Quantime
Software Science, Inc.

DATABASE MANAGEMENT PROGRAM

Coffman Systems, Inc.
Computers For Marketing Corp.
Computer Associates
Devcom Mid-America
Information Resources, Inc.
Marketing Info. Systems
Market Probe International
Matrix, Inc.
P-Stat, Inc.
SAS Institute, Inc.
SPSS, inc.

DATA EDITING

Analytical Computer Service, inc.
Consulting, Hardware & Processing
CRC Information Sys.
Downie-Pine Company
Hodges & Assoc.
M/A/R/C Inc.
Matrix, Inc.
Mitchell Management Sys.
P-Stat, Inc.
Quantime

SAS Institute
SPSS, inc.

DATA ENTRY

Coffman Systems, Inc.
Computers For Marketing Corp.
DigiData Entry System
Downie-Pine Company
Market Probe International
Mitchell Management Sys.
P-Stat, inc.
Quantime
SAS Institute
SPSS, inc.

DEMOGRAPHIC ANALYSIS

Computer Associates
Information Resources, Inc.
LPC, Inc.
Mitchell Management Sys.
P-Stat, Inc.
SAS Institute, Inc.
SPSS,inc.

DISCRIMINANT ANALYSIS

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

EXPERIMENTAL DESIGN THEORY

SAS Institute, Inc.
SPSS, inc.

FACTOR ANALYSIS/ PRINCIPAL COMPONENT

CRC Information Sys.
Information Resources, Inc.
P-Stat, inc.
SPSS, inc.

FOCUS GROUP MANAGEMENT

Mitchell Management Sys.

GENERATION/BALANCED SAMPLING DESIGN

P-Stat, inc.

GEOGRAPHIC INFORMATION SERVICE

LPC,Inc.
MPSI Systems, Inc.

GRAPHIC DISPLAY

Computer Associates
Devcom Mid-America
Downie-Pine Company
P-Stat, Inc.
SPSS, inc.
Statistical Innovations

INTERACTION/ CLASSIFICATION ANALYSIS

Perreault & Assoc.
SAS Institute, Inc.
SPSS, Inc.

INTERACTIVE TABULATION

Downie-Pine Company
Matrix, Inc.
Quantime
SPSS, inc.

KEY TO DISK

Computers For Marketing Corp.
Market Probe International

LOGIT/LOG-LINEAR ANALYSIS

Concurrent Technologies Corp.
SAS Institute, Inc.
SPSS, inc.

MARKET MATCHING

LPC, Inc.
Mitchell Management Sys.

MARKET SEGMENTATION

Coffman Systems, Inc.
CRC Information Sys.
LPC, Inc.
M/A/R/C Inc.
Marketing Info. Systems
Mitchell Managemnt Sys.
Perreault & Assoc.
SPSS, inc.
Statistical Innovation

MEDIA ANALYSIS

Coffman Systems, Inc.
Mitchell Management Sys.
SAS Institute, Inc.
SPSS, inc.

MULTIDIMENSIONAL SCALING

Computer Associates
CRC Information Sys.

Information Resources, Inc.
SPSS, Inc.

MULTINOMINAL LOGIT ANALYSIS

Caliper Corporation

MULTIVARIATE METHODS

Concurrent Technologies Corp.
P-Stat, Inc.
SAS Institute, Inc.
SPSS, Inc.

NON-PARAMETRIC STATISTICS

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

ON-LINE DATA TABULATION

Computers For Marketing Corp.
CRC Information Sys.
Downie-Pine Company
M/A/R/C Inc.
Matrix, Inc.
Mitchell Management Sys.
Quantime
P-Stat, Inc.
SAS Institute, Inc,
SPSS, Inc.

ON-LINE TELEPHONE INTERVIEWING

Coffman Systems
Computers For Marketing Corp.
M/A/R/C Inc.
Marketing Info. Systems
Quantime

PATTERN ANALYSIS

Concurrent Technologies Corp.
Computer Associates
CRC Information Sys.
Mitchell Management Sys.
SAS Institute, Inc.

PERCEPTUAL MAPPING

CRC Information Sys.
SAS Institute, Inc.
SPSS, Inc.

PRICE ELASTICITY MEASUREMENT

Concurrent Technologies Corp.
SAS Institute, Inc.

PROGRAMMING LANGUAGE

Quantime
SAS Institute, Inc.

QUADRANT ANALYSIS

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

QUESTIONNAIRE DESIGN LANGUAGE

Computers For Marketing Corp.

CRC Information Sys.
Downie-Pine Company
M/A/R/C Inc.

RANKING

Coffman Systems, Inc.
Computer Associates
Computers For Marketing Corp.
Downie-Pine Company
M/A/R/C Inc.
Mitchell Management Sys.
P-Stat, Inc.
SPSS, Inc.

REGRESSION/ CORRELATION ANALYSIS

Coffman Systems, Inc.
Computer Associates
Concurrent Technologies Corp.
CRC Information Sys.
Market Probe International
Isaacs Computing Assoc.
P-Stat, Inc.
SAS Institute
SPSS, Inc.

SALES ANALYSIS

Analytical Consultants International
Coffman Systems
Computer Associates
Computers For Marketing Corp.
Concurrent Technologies Corp.
Devcom Mid-America
GMD Incorporated
Information Resources, Inc.
Marketing Info. Systems
Mitchell Management Sys.
P-Stat, Inc.
SAS Institute
SPSS, Inc.

SALES DATABASE

Analytical Consultants International
Coffman Systems, Inc.
Computer Associates
Devcom Mid-America
Information Resources, Inc.
Marketing Info. Systems
Mitchell Management Sys.
SAS Institute, Inc.

SALES EFFECTIVENESS MEASUREMENT

Analytical Consultants International
Coffman Systems, Inc.
GMD Incorporated
Information Resources, Inc.
Marketing Info. Systems
Mitchell Management Sys.

SALES FORECASTING

Analytical Consultants International
Concurrent Technologies Corp.
Marketing Info. Systems
Mitchell Management Sys.
P-Stat, Inc.
SAS Institute
Spar, Inc.
SPSS, Inc.

SAMPLE SIZE DETERMINATION

SAS Institute, Inc.

SAMPLE WEIGHTING

Computers For Marketing Corp.
CRC Information Sys.
Downie-Pine Company
M/A/R/C Inc.

Matrix, Inc.
P-Stat, Inc.
Quantime
SAS Institute, Inc.
SPSS, Inc.

SIMULATION/MODELING

Concurrent Technologies Corp.
CRC Information Sys.
SAS Institute
SPSS, Inc.

'T' TESTS

Computer Associates
Computers For Marketing Corp.
CRC Information Sys.
Downie-Pine Company
Information Resources, Inc.
M/A/R/C Inc.
Matrix, Inc.
P-Stat, Inc.
Quantime
SAS Institute
SPSS, Inc.

TABLE EDITING

Computers For Marketing Corp.
CRC Information Sys.
Downie-Pine Company
Matrix, Inc.
P-Stat, Inc.
Quantime
SPSS, Inc.

TABULATION SYSTEM

Analytical Computer Service, Inc.
Computers For Marketing Corp.
Consulting, Hardware & Processing
CRC Information Sys.
Downie-Pine Company
Information Resources, Inc.
M/A/R/C Inc.
Market Probe International
Matrix, Inc.
Perreault & Assoc.
P-Stat, Inc.
Quantime
SAS Institute, Inc.
Sigma Research
SPSS, Inc.

TELEPHONE INTERVIEWING/ SAMPLING

Coffman System
Computers For Marketing Corp.
CRC Information Sys.
M/A/R/C Inc.
Quantime

TIME-SERIES ANALYSIS

Computer Associates
Concurrent Technologies Corp.
Information Resources, Inc.
Market Probe International
SAS Institute
SPSS, Inc.

VERBATIM CODING

Computers For Marketing Corp.
M/A/R/C Inc.

VOLUMETRIC ANALYSIS

Quantime
SAS Institute, Inc.
SPSS, Inc.

Though the panel has its share of kids from mainstream America, Zandl says her clients are most interested in what she calls "Alpha Kids,"—trendsetters and early adopters who seem to have their fingers on the pulse of the country, who telegraph changes in societal and consumer trends.

Focus groups

For more in-depth information, she conducts focus groups, often contacting a panelist and asking him or her to gather the necessary number of friends who fit the client's demographic requirements and/or are users of certain products. Zandl says the spirited interplay between respondents in these groups frequently surprises clients who observe them.

"They'll say, 'Why are these people so animated?' They can't believe how forthcoming they are, but because they're with their friends, the kids can be totally open and disagree with each other, so you get so much more out of the group.

"Clients are also sometimes concerned that if (the respondents) are friends, they'll just reflect each other's views, but that's not the case. Clients are surprised that these kids can be friends and be so different."

When possible, Zandl says she likes to conduct the groups in participants' homes because of the valuable context it provides.

"It makes people more comfortable and gives you a way to gauge the situation that the kids are growing up in. One of the things about people you meet in focus groups is that you have no idea where they're coming from, what their background is."

Remarkably cynical

Zandl says that since kids are not set in their ways yet, they are more inclined to be excited by the novelty of a product or a promotion than an older consumer. But, she adds, they are also remarkably cynical about certain things.

"Through the media, they've had much more exposure to what they call 'scams.' I think what they respond to are messages where they sense there is some semblance of integrity; that's often missing. For example, they respond to Nike advertising and products because they sense that everything about them is appropriate; the people in the ad are hip and it makes sense that these people would be using the product. (Nike) uses hip people and makes them hip, as opposed to just signing up somebody who's on the top of the charts. That has a lot of meaning for kids."

Zandl credits her rapport with kids to the fact that she's not judgmental. Few people ask kids questions out of curiosity, she says, and when they do, it's either to make fun of them, or from a parental point of view—"What are you wearing *that* for?" This is where her cultural view of the youth market comes into play.

"If you were in a totally different culture and you saw somebody wearing something unusual, you wouldn't deride it, you would be interested in knowing what its origins are. What does it mean? That's how I look at it. To me, it's just eternally fascinating." ❑

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Sales Offices

by Joseph Rydholm
managing editor

Re-thinking the youth market

Many marketers perceive the youth market as a homogenous mass defined by one thing: age. It's Irma Zandl's job to change that perception. Zandl is president of Xtreme, Inc., a New York-based marketing consulting firm she started four years ago after stints in marketing at cosmetics firms such as Revlon and L'Oreal.

Zandl says that one of her goals is to get her clients (which include manufacturers of soft drinks, snack foods, jeans, and personal care products) to think of young consumers as an ethnic market that has its own set of customs and uses a complex language of slang, gestures, and symbols (found on clothing, jewelry, etc.) to communicate.

"Where a lot of people run into trouble with the youth market is they end up parodying it or they end up ridiculing it, basically because they just don't understand it and it seems like that's the thing to do. Whereas you know that if they were dealing with another culture or an international market, they would approach it with a totally different mindset."

Often she finds that marketers believe the only way to reach kids is to make their messages "fun."

"So many people do a disservice to the youth market when they think it only responds to 'fun.' That's really only one small segment of it. When you talk to young people, you can talk about the fun things and they'll be high-fiving each other and then the conversation can very quickly turn to serious issues in their lives.

"So it's not surprising that they also respond to things that have real emotion to them. I think that's very important because you can make things much broader and more meaningful in terms of reaching young people. It doesn't have to be one long MTV-style thing, which is how everything seems to be targeted to the young consumer."

National panel

Zandl collects information on the youth market through the Xtreme Consumer Panel, a national panel of over 1,000 12-24 year-olds that provides material for a newsletter and serves as a pool for participants in the many focus groups she conducts around the country. Those efforts are supplemented with a great deal of observational research and hours of conversation with kids—all of which keeps her up to date on trends in fashion, interests, and behavior.

"Research is a part of our consulting services, in terms of providing marketing and promotion to reach the young consumer, but we're not by any stretch of the imagination a research firm. Many of our methods are quite unorthodox, so it's sort of an education for a lot of our clients to see the way we gather our information."

To create the panel, Zandl went through her Rolodex and used many personal contacts to find 300 sons, daughters, cousins, nieces, nephews, and friends between the ages of 12 and 24. She got an 80% response rate to the first questionnaire and was able to expand the panel to its current size by asking panelists to hand out questionnaires to friends—a practice she still employs to keep new participants coming in.

Panelists fill out a checklist of items purchased in the last six months—groceries, toiletries, clothing—and complete an "in/out" section to show their tastes in music, food, clothing, and their favorite activities.

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