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Business-to-business issue

April, 1990



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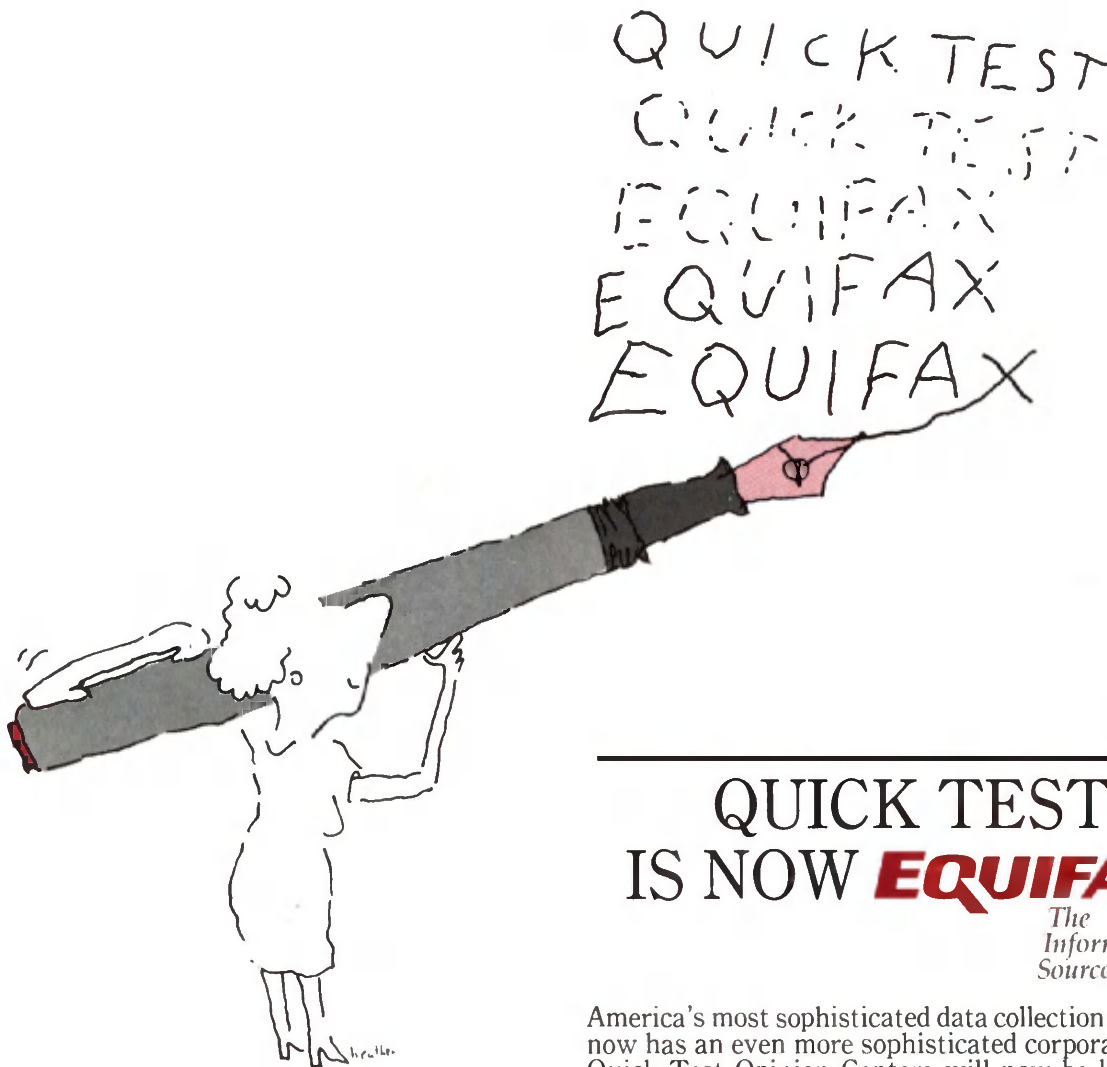
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Cover

Use of this striking image of a red-tailed hawk helped Cleaver-Brooks increase awareness of its CB-Hawk boiler control device.



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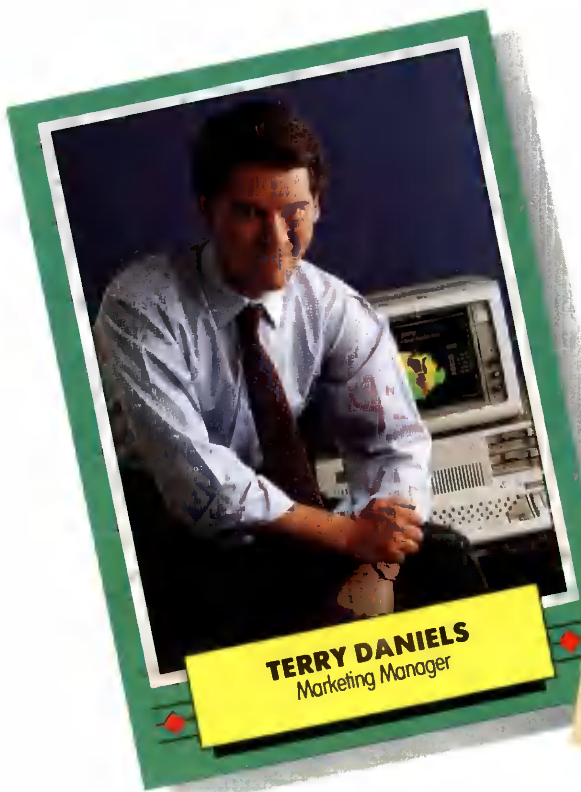
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It watches like a hawk



Focus groups aid positioning of new boiler control technology

by Joseph Rydholm/managing editor

Introducing any new product can be difficult, but when that product is very different from anything else on the market, the process can be especially tough. Proper positioning can make or break the product's chances of success.

This was just one of the issues facing the Cleaver-Brooks Co. in late 1988 as the Milwaukee-based manufacturer of boilers and boiler control technology sat poised to unveil "The CB-Hawk," an innovative new boiler control system it developed in conjunction with Honeywell.

Steve Connor, general sales manager, Cleaver-Brooks, says that several features set the computer-based system apart from others on the market.

"The Hawk replaces normal electro-mechanical pressure and/or temperature controls with state of the art, solid state

sensors that continually monitor boiler and burner operation. By glancing at the unit's LCD display, the operator can tell exactly what mode of operation he's in, what the pressure and temperature are," he says.

Because the unit is programmed to "know" the characteristics of the boiler it is attached to, if a problem occurs, it will shut down the boiler, provide a fault history, and show a diagnosis.

A communications interface called the CB-Hawk Link lets the operator monitor boiler operation on-site or remotely, using a computer and modem. Connor says that the integration of all these features into one system is what makes the Hawk so different.

Focus groups

Because of the Hawk's features and benefits—many of them previously un-

available in such a product—Cleaver-Brooks held focus groups with prospective buyers from a variety of industries and applications, such as hospitals, manufacturing plants, schools and universities.

"The main reason for the focus groups was to determine how we were going to position the product," Connor says. "We were looking for prospective buyers' hot buttons. What features did they respond to? Rate control? Local and remote communications? Advanced diagnostics? What was important to them?"

Curtis Gorrell, vice president, account supervisor, at the Milwaukee office of Starmark, Inc., a marketing communications firm that assisted Cleaver-Brooks, says that determining the product's target audience was also an important goal of the research.

"We had made a number of assumptions about whom the buying influences could be. But these assumptions were based on what we knew about the boiler room and what we knew about the hierarchy of buying based on our experience with boilers. With a control product and with all of the different people it could impact—facility managers, building owners, developers—people that we weren't as used to dealing with in the marketplace, we had to test our assumptions, and the focus groups were the best way to determine how these different audiences were motivated in terms of features and benefits.

"We knew the product had a whole series of features and benefits, but it's one thing for us to have an opinion, it's another thing for a customer to tell you what really is important."



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To ascertain the importance of the various features and benefits, respondents were asked to rate their choices. Discussions were used to elicit opinions and clarify any questions about the product's operation.

"We not only probed their initial opinions, but we also gave them some things to react to and ideas to talk about. That was necessary in this instance because the product was so new. Some of the things we brought up as features and benefits were simply never available before," Gorrell says.

Linked with observers

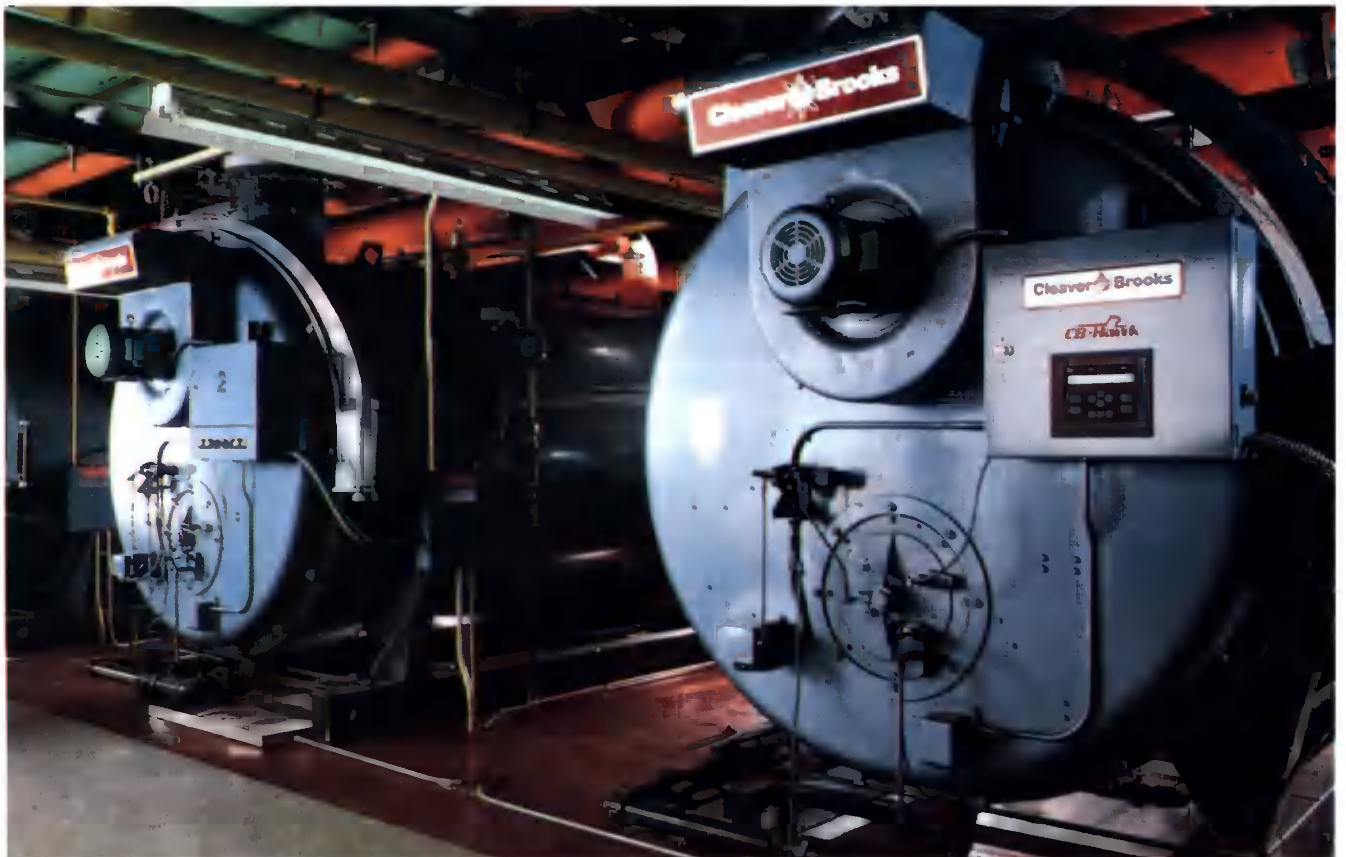
In addition, the moderator was linked via earplug to Cleaver-Brooks, Honeywell and Starmark observers in an adjacent room.

"We had the ability to ask (the moderator) to probe a certain issue or to modify the way she was asking a question so that the experts who were watching could help the moderator guide these people through the technical data. Particularly with the engineering group, there were

minutes of the discussion when I just didn't know what they were talking about, and I've been working on this account for years! The probing was definitely an aid in getting to the results and it was set up in such a way that there was no compromising, at least in our opinion, the validity of the findings."

Two audiences

Two target audiences emerged from
continued on p. 42



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Combining banner points— is the variance correct?

by Gary M. Mullet

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

Most of us have learned a lesson that bears repeating, especially since we just celebrated Valentine's Day a few months ago: Don't take your significant other for granted. An equally important lesson—which some have yet to learn—is: Don't take your data tabulation package for granted.

While Dear Abby, Dear Ann, and Dr. Ruth can help us with the former lesson, the example below, which shows why our data tabulations are not always what they seem to be, should help with the latter.

In what follows, I won't be talking about straight data tabulation—vanilla tab, as it's known to some. Most tab packages perform equally well on such tasks. However, frequently analysts require weighting or pooling of a particular group of banner points. It's here that taking our tab package for granted may cause problems.

The problem

Here's what happened. While looking at some tabs recently (and I don't even know what the tab package was, so I can't say

if the one you use is guilty), three particular banner points were of interest—"Brand A," "Brand B," and "Brand A & Brand B." In other words, tabs were requested for Brand A, alone, Brand B, alone (these were independent cells), and, in this case at least, the combination of Brand A and Brand B. That is, the last banner point was to consider the two sets of brand information as if they came from a single sample of 250 respondents. The usual statistics were asked for—mean, variance, and standard error—and the results are shown below.

	Brand A	Brand B	Brand A & Brand B
n	100	150	250
Mean	4.5	7.0	5.75
Variance	13.067	15.467	14.267
Standard			
Deviation	3.615	3.933	3.774
Standard			
Error	.361	.321	.341

Brands A and B were not the only two considered in the survey. Thus, the "Brand A & Brand B" column is not the same as the total column, which usually is shown first in the tabulation. Instead, it was a specially created banner point, created with a specific purpose by the analyst.

It's pretty plain what was done. The two cell sizes were merely added to come up with the total of 250. For each of the other three statistics, a simple arithmetic mean was found. That is, the two values were merely added and divided by two, for

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each statistic on the table. The individual cell standard errors were correctly calculated by taking the square root of the variance divided by the cell size (or the standard deviation divided by the square root of the cell size).

If you recall back to when you first took basic statistics (or vice versa), you know that the standard error is used to either test the significance of the mean or for establishing confidence intervals. That's all right for either the "Brand A" column or "Brand B" column alone; for the combined or pooled column, with the exception of the sample size, every number is incorrect. Thus, not only is the mean wrong, so are any inferences based on this mean using the printed standard error. (The mean would be O.K. if the two cell sizes were the same; the other numbers are still incorrect.)

It's also interesting that no one questioned the above table; the rationale for accepting it at face value was that if a computer printed it, it must be correct. Simple algebra would confirm that either the combined variance is incorrect or the combined standard deviation must be (or both, as is the case). Since the standard deviation is the square root of the variance, we can't generally find numbers such that if we add them and divide the sum by two and then take the square root (the pooled variance converted into a standard deviation), we'll get the same result as if we take the square roots first, then add and divide by two (the pooled standard deviation). This comes from basic algebra, and common sense, not statistics.

First, we'll see what the correct numbers should be. Then we'll show just enough theory and formulae to see why they aren't correct as is. The correct numbers for the combined column are:

<u>Brand A & Brand B</u>	
n	250
Mean	6.00
Variance	?
Standard Deviation	?
Standard Error	?

Why all the uncertainty? Because the weighted mean is the only number that can be accurately computed from the statistics given for the original two banner points shown, i.e., Brand A and Brand B. It comes from taking each sample size times its respective mean and dividing the total by the new total sample size. That is:

$$[100(4.5) + 150(7.0)]/250 = (450 + 1050)/250 = 1500/250 = 6$$

In other words, the sample mean rating for all 250 of the observations combined is 6.00. Intuitively, this is appealing, since the Brand A folks contribute 450 to the total and the Brand B sample contributes another 1050. Thus the sample mean behaves well.

Now, as you also probably recall from your introductory statistics course, the sample variance is calculated by taking the squared difference between each individual observation and the sample mean, adding these all up and dividing by the sample size minus one. Specifically,

$$S^2 = \sum(X - \bar{X})^2 / (n-1) \quad (1)$$

$$= \sum(X-6)^2 / 249, \text{ for the numbers above}$$

See the problem? Without another pass through the data by the tab package, we cannot calculate the combined sample variance. The individual variances were calculated by using the above formula for each of Brand A and Brand B; the first time 4.5 was used for the sample mean and the second time 7.0 was. So far so good. But is there any way that we can get the variance for our total sample of 250 from the summary data shown? Probably not, unless we go through the data with our tabulation package again. Hence, we can't accurately determine the combined standard deviation or standard error, either.

To further emphasize the point, again consider two independent cells. The first shows a mean of 1 and a variance of 3. The second shows a mean of 11 and a variance of 3. Although intuition (and the tab package used for our original example) would say that the combined variance is also 3, a moment's reflection should convince you that it will be much larger than that. Why? Because the individual variances of three are found by taking squared deviations from the respective means of 1 and 11. The combined variance will have to be found by taking squared deviations from the new mean of 6, assuming equal cell sizes. Clearly, things don't add up if we merely average the variances. It is safe to say that the variance correctly calculated from the combined sample will be larger, possibly by several orders of magnitude, than the "average variance."

Conclusion

We've seen that it's imperative for the analyst to know and understand what goes on inside the data tabulation package used when banner points are combined. Otherwise, you could be faced with an array of statistics which are incorrect and these, in turn, could lead to incorrect statistical conclusions from the data. This, in turn, can cause either a real loss of dollars or a significant opportunity cost.

Here the combination was relatively simple; the banner points were simply to be pooled into a combined sample. It gets more difficult to be sure that the tabulation is done correctly when weighted banner points are produced. Another layer of the onion is when sums or differences are to be found. Finally, although here we were involved with independent cells, clearly such is not always the case. Dependent cells require even more special handling.

The moral is: don't accept the printouts at face value; probe, dig, and probe some more into the underlying computations. □

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Uses and misuses of business-to-business focus groups

by Alan Zimmerman

Editor's note: Alan Zimmerman is founder and principal of Radley Resources, a Westfield, New Jersey research company specializing in business-to-business research. His 25 years in various international and domestic marketing positions include vice president of marketing with E.F. Hauserman, a movable wall and office furniture manufacturer, and marketing executive for Westinghouse Furniture Systems.

Jim Carroll, marketing manager for American Lighting (name and company changed to protect the innocent) had heard a lot about focus groups. He wasn't sure what exactly constituted a focus group, but other managers at the parent company talked about focus groups and he liked the sound of them.

Jim decided to convene his own focus groups to discuss some potential new product prototypes coming out of R&D. Since his research budget was practically nonexistent, he decided to do all the work himself. Jim felt the people with the most valuable opinions on new products were dealers who sold these products to electrical contractors. Acting quickly, he and his assistants chose two target cities for the research. He called several dealers in Atlanta and Chicago and convened a meeting at his factory.

Jim thought this would be a good opportunity to improve the selling atmosphere with these dealers. He chartered the company plane to pick up each group and fly them to his headquarters. The night

before the meeting he hosted a large banquet and arranged for the president of the company to make a speech about the importance of the new products to the success of American Lighting.

The focus groups were held the next day. Jim decided he needed some technical expertise in the room so he invited each new product manager to make a presentation of their prototypes. A typical presentation began with the product rationale followed by the solutions to customer problems provided by the new product and the potential sales to be realized by each.

After each presentation, Jim asked the assembled group, "Well, what do you think?" Both groups were highly enthusiastic about all of the new products presented. Jim felt very good and ordered full speed ahead on development.

The products went quickly through final prototype stages, pilot manufacturing, and full scale production and were introduced with advertising to electrical contractors, sales training, and dealer training programs. A year later, one product was highly successful, one showed marginal results, and three were in the doldrums.

Now Jim was faced with finding out what went wrong. "I don't understand it. We used the focus group technique that everyone talks about, but the products didn't sell. How could this be?"

What went wrong

The succinct answer is: Jim did about everything wrong that he could possibly do. Let's look at what he called a focus group and see what mistakes were made.

First, he violated a very basic rule of business-to-business focus groups: Never put together a group of individuals who see themselves as competitors. Individuals who work for competing firms can make an effective group, but these individuals have to see themselves as professionals, more loyal to their profession than their company. So, for instance, architects who compete with one another or data communications managers working for competing firms who tend to identify with their professional duties can make an effective focus group. Directors of marketing from competing firms or competing dealers in the same geographic area will generally not make an effective group if the discussion can give one a competitive advantage over the others in the room.

A second error is using a focus group occasion as a selling situation. The speeches by the president as well as the use of the company plane and the wining and dining of subjects were mistakes. All of this tends to color the responses. Some participants will react by being very kind and telling the organizers what they want to hear. Others will work hard to show their independence and be more critical than they otherwise would be. In either case, their true feelings are not being elicited.

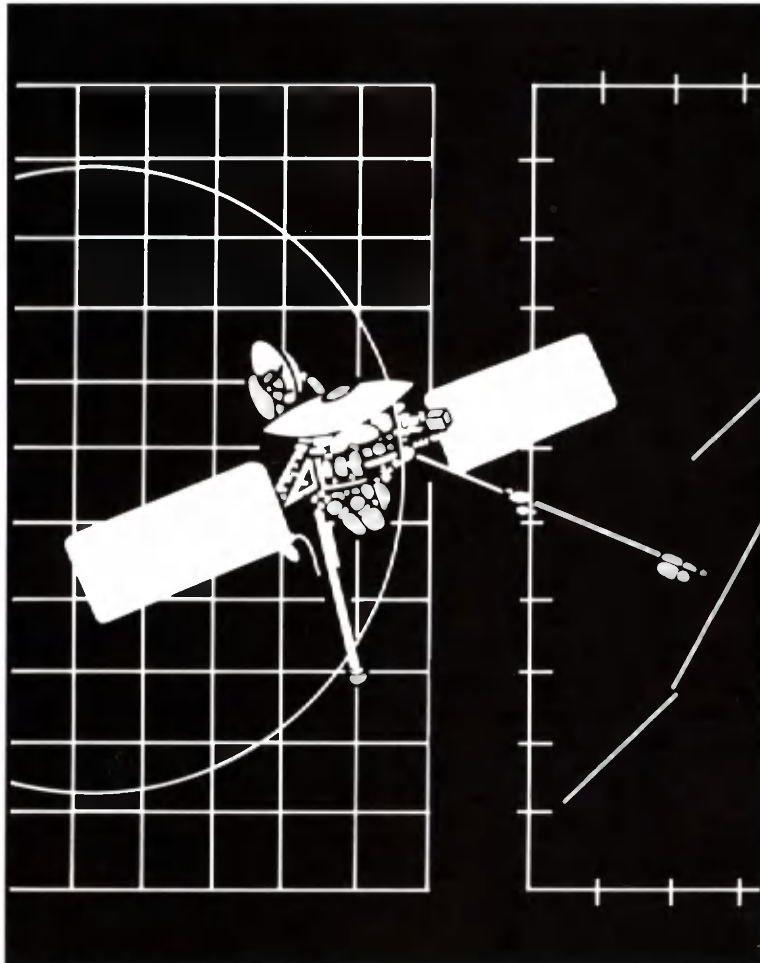
The third mistake is using the "owners" of the new products to present the products. This has the effect of chilling any true reactions. It's only human nature for respondents not to want to "insult the baby with the mother in the room." This situation can also frequently lead to con-

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frontation between the inventors or sponsors of the new product and the respondents.

Another error that's easy to spot in Jim's organization of the focus group is that he didn't develop a discussion guide. His very general question, "What do you think?" is not designed to elicit specific comments in specific areas. Respondents tend to be lazy and can take the easy way out without sharply honed, probing questions.

Mr. Carroll's experience may seem

like an extreme case but in our experience in the business-to-business arena it is all too common. Generally speaking, marketing people in industrial areas have not had much exposure to marketing research. When they have, it is usually consumer-oriented and relates more to large scale attitude surveys or focus groups that probe feelings which are usually not appropriate for business-to-business markets. A few firms organize what they call "focus groups" with employees for discussing sensitive issues, but the atmosphere is not

right to get at real feelings.

Getting the best results

Many business marketers use the term "focus group" without any real understanding of the requirements for developing useful information. To produce the best results from focus groups, the organizers must create a non-judgmental atmosphere. It is best if the respondents are randomly recruited and don't know each other. In many cases it is difficult to recruit individuals who are not acquainted, especially in business-to-business market segments. But random recruitment establishes a better atmosphere than having one respondent recruit another.

Respondents must be put at ease when they arrive at the groups. We always assure focus group members that "no salespeople will call" and we strongly urge our clients not to call and recriminate with participants after the groups. We do, however, ask respondents if they wish to be contacted by the company. If so, focus groups can sometimes be a valuable source of sales leads.

We believe focus groups are uniquely applicable to many business-to-business markets. Since large, quantitative studies are not meaningful in market segments of only a few major customers, speaking to a select few of the most important buyers can yield important qualitative as well as quantitative information. Most business markets operate on the 80/20 rule, meaning the largest percentage of purchases are made by a small number of all buyers.

Focus groups are the recommended method for research when:

- A firm needs to learn about a new field.
- A company wants to assess the reaction to new products, services or advertising concepts.
- A firm wants to fully understand how customers think about buying or specifying decisions or how they perceive suppliers.
- Buyers need to see a demonstration of the product in order to react to it.
- Very large products (yet small enough to fit in a conference room) must be shown to buyers.
- A manufacturer wants its customers to have hands-on experience with a product.
- Confidentiality is critical, such as for a new advertising campaign or a new product prototype.

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— Joel Huber, *Journal of Marketing Research*

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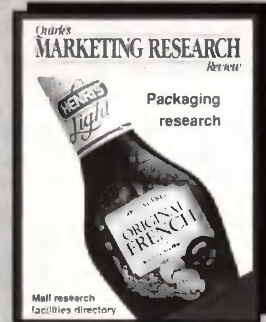
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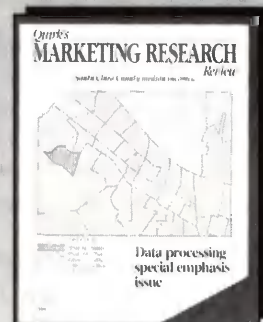
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...and in 1990, QMRR will introduce the *Research SourceBook*, listing more than 4,000 providers of services and products for marketing research buyers.

In these cases, many clients decide to use focus groups to get a good reading on a particular problem.

Recent projects

Here are some examples of how businesses have successfully used focus groups recently:

- A multiproduct firm wished to determine whether a unified sales force handling all its product lines would be seen as an advantage by its target segment. We arranged focus groups with specifiers in

New York, Chicago, and Los Angeles. Respondents were shown samples of potential product offerings and advertising. The end result was a clear rejection of the proposal. Specifiers were far more concerned with a salesperson's expertise in any particular line. As respondents saw it, this outweighed the small inconvenience of dealing with several salespeople from the company. The firm decided against implementing this costly and potentially de-stabilizing reorganization.

- One firm was contemplating the in-





roduction of a new and very different office furniture system. We held focus groups in New York, Chicago, and Los Angeles with independent interior designers and facility managers of large corporations. To do this, the firm developed a large prototype of the system and shipped it from facility to facility. The firm also provided a videotape and a small scale mock-up. The moderator gave a 45-minute presentation so that the respondents would fully understand the new concept. While the product was generally well-received, there were some aspects that required redesign and the firm proceeded to do that, thereby postponing a multimillion dollar investment in its plant.

- Another firm was planning to introduce a new landscape lighting product line. Focus groups held in Atlanta and northern New Jersey with electrical contractors, lighting consultants, landscape architects, and homeowners gave this firm invaluable information for designing advertising, promotion, and distribution. First-year sales were well above expectations as a result of the information developed.

- A large telephone company wished to determine customer perceptions of a new service to be provided on corporate premises. Four focus groups were held in New York and Chicago with telecommunications managers representing major corporations. The sponsoring firm found out that the need for this service was limited to a very small number of heavy users. This segment was easily identified from only four focus groups and the client developed a targeted marketing program to reach this small number of important customers.

- Another client was marketing a computer-based electronic presentation system. The client had to decide whether to proceed full speed with this product or de-emphasize it. Focus groups were held with people responsible for the selection and purchase of this equipment. One of the most important findings from this research was that the respondents were not the current customers of the research sponsor. In addition, the product was perceived to perform significantly worse than its major competitor. These facts convinced the client to reevaluate any further investment in the product line. □

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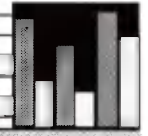
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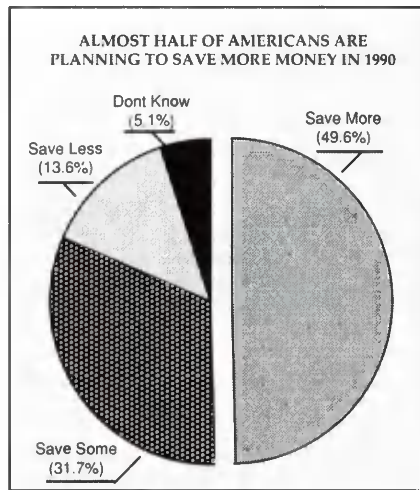


Americans plan to save in 1990

America may be changing into a nation of savers rather than spenders, according to a new Maritz AmeriPoll. The nationally representative telephone survey disclosed that 50% of respondents are planning to save more money in 1990 than they did in 1989.

Fifty-two percent of male respondents said they will stash away more money this year than last, as did 47% of female respondents. Of all those surveyed, 32% indicated they would maintain their current saving level. Only 14% of people said they are planning to save less money in 1990 than in 1989.

Getting out of debt may also be a new priority for many Americans. A large



number of respondents (41%) told interviewers they expect their overall debts to decrease this year. Twenty-three percent of people anticipate their debts will increase, while indebtedness for three of ten Americans is expected to remain about the same this year. More males than females said they expect to decrease their debts. More women suspect their liabilities will remain about the same.

In general, Americans are optimistic about the state of the economy. The survey discovered that 43% of respondents rate current economic conditions as good, while 5% rate them very good. One-quarter of the population said conditions

continued on p. 38

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NAMES OF NOTE



NFO Research, Inc., Greenwich, CT, has appointed **Nile M. Rowan** vice president—director of product marketing. In addition, **Diane M. Gerold** has been promoted to vice president—marketing for the company's San Francisco marketing group.

Francine H. Ross has been appointed corporate vice president, director of marketing research for *Combe Incorporated*, makers of personal health and beauty aid products.



Rowan

Ross

Heather Thiessen and **Sal Oropesa** have each been promoted to the position of supervisor in the Strategic Planning

and Research Dept. of *DDB Needham Chicago*.

Total Research Corp., Princeton, NJ, announces the following hirings and promotions. **Jim Hennessey** has been promoted to senior project director. **Clare A. Rechel** has been named project director. Previously she was a senior consumer research analyst at *Supermarkets General Corp.* **Janna Walsh** has been named associate research director of the health care group. **Lisa Jorgensen** has been named research assistant. **Beth Lee**

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Quirk's
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Review

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has been named manager of client services. And **Lynn Spitzer** has been named senior methodologist. Previously she was a systems engineer at IBM.

Catherine Bryant & Associates, a Greensboro, NC area marketing research and consulting firm, announces the following promotions. **Julie Giese** to project director, **Gina Gorelli** to research assistant and traffic coordinator, **Shelbie Redmond** to manager, coding operations, and **Bohbie Sapp** to manager, technical services operations. In addition, **Patsy Robertson** has been promoted to administrative assistant, supporting both the Survey Research division and the Technical Services division.

Victor S. Mordowitz has joined Stamford, CT-based *Electronic Information Systems, Inc.* as vice president of engineering.

Rhona Stokols has joined *Roure, Inc.* as director, market and consumer research. Previously she was a fragrance industry research consultant.



Stokols

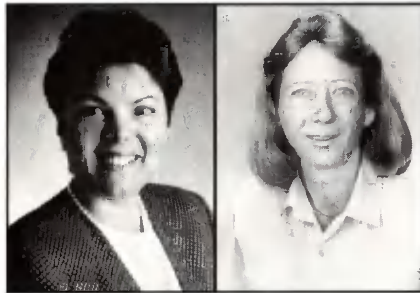
Neuwirth

Sherri Neuwirth has been promoted to senior vice president and general manager of the Paramus, NJ, office of *Elrick and Lavidge, Inc.* In addition, **Gary Dispensa** has been appointed to the new position of quantitative information services director in the Chicago area office.

Toni Gahhe has joined *Interviewing Services of America*, Van Nuys, CA, as national marketing director.

Southfield, MI-based *Nordhaus Research Inc.* has named **Tim Taylor** vice president, **David Steinberg** senior project director, and **Philip Hamner** project director.

Michele M. Carroll has joined San Francisco-based *Itel Rail Corp.*, a rail car leasing firm, as director of marketing research.



Carroll

Kaufman

Gaye Kaufman has been named research director for *NKH&W Marketing Communications, Inc.*, Kansas City, MO.

Walker: Research and Analysis has named **Wesley H. Jones, Ph.D.** as vice president, marketing sciences. Previously he was with E.I. Dupont Co. In addition, **Becky Desai** has been named project director and **Kent Gordon** has been named vice president of the company's western region client service office.

Yourdon, Inc., a part of Eastman Kodak Co.'s Integration and Systems Products Division, has named **John M. Baker** vice president of research.

Katheryn A. Silverthorn has joined the Gardena, CA-based Automotive Research Group of *Maritz Marketing*



Silverthorn

Wheelock

Research as an account manager. Previously she was with Nissan Motor Corp. as a market analysis specialist. In addition, **William R. Wheelock** has joined Maritz as director, telecommunications marketing. Previously, he was with AT&T.

Nicholas G. Starker has joined *Quality Controlled Services* as an account



Starker

representative in the Chicago area.

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Romania needs help with its research!

According to a release from the Romanian embassy in New York, The Council of the National Salvation Front of Romania would like to set up "as soon as possible" a National Institute for Public Opinion Research, to perform surveys for the government on a wide range of political and social matters, and a similar institute, independent of the government.

Therefore, the release says, the Ministry of Foreign Affairs of Romania would

like to receive information regarding the structure and operation of such an institute; offers for hardware/software for data collection, storage, and processing; sample questionnaires and other descriptive materials for the implementation of such an institute.

"The setting up of such Survey Institutes is urgently required," the release states. "They must be created with a view to properly and democratically prepare the first national free elections in Romania, as well as for making other important political decisions. Priority will be given

to the offers that are received immediately, that have the most attractive financial conditions, the shortest time of implementation, and the highest level of performance."

Interested parties should submit offers to The Minister of Foreign Affairs, Piata Victoriei No. 1, Bucharest, Romania, c/o The Office of the Economic Counselor, 573-577 Third Ave., New York, NY 10016.

New release of Conjoint Designer

Bretton-Clark has released Version 3 of Conjoint Designer, which adds new functions, including the ability to preview analysis results, and a "Lotus-like" user interface with on-line help. Also available are new, inexpensive starter kits for all Bretton-Clark software. These include manuals and working copies of the programs that are restricted to small problems. For more information, call 212-575-1568.

Classify by ZIP Plus 4

PRIZM Plus 4, a new system offered by Claritas Corp. allows classification of the small ZIP Plus 4 postal areas in terms of Claritas' PRIZM market segmentation system. The system defines nearly nine million postal ZIP Plus 4 areas by PRIZM cluster type. An average of six households live in these areas. Examples of areas covered by one ZIP Plus 4 include one side of a street between two intersections and one floor of an apartment building. For more information, call 703-683-8300.

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Portable electronic interviewing device goes where the respondents are

by Marsha Kuykendall

As survey costs continue to rise and the number of willing respondents dwindles, finding cost-effective ways of gathering information from consumers is becoming a key concern among marketing researchers nationwide.

Americom Research, a Tennessee-based research technology company, has taken up the challenge with the introduction of a new piece of electronic interviewing technology called the OpinionPole. The OpinionPole houses a computer in a portable kiosk that can be placed attended or unattended in high-traffic locations such as malls or department stores to conduct surveys and gather respondent data.

OpinionPole uses a special software package called Poll-Maker that allows all types of survey questions to be formatted. The package offers color graphics, animation, and sound presentations designed to stimulate user interest. Results can be tabulated within a few days of interview completion.

"People like using OpinionPole, and sample sizes are generally large," says Gene Telser, Americom's senior vice president of research. "The system can be used by any business for collecting respondent data from virtually any site, for presenting information

to consumers, or a combination of the two. It's also ideal for sub-group analysis to determine differences between different groups.

"OpinionPole puts you right where you want to be—at the time and place where people are shopping for the products about which the survey is being conducted.

When you're trying to survey hard to reach people, like frequent airline travelers, the OpinionPole can be where they are—at the airports."

The system offers multilingual options, touch-screen as well as standard keyboard formats, and can edit and present digital maps, using Census Bureau 1990 cartographic data, that can determine within a block where a respondent lives.

Mike McClain, operations vice president of Low Country, Inc., a Burger King franchisee with six locations in middle Tennessee, found the mapping capability helpful in a recent customer survey, which placed OpinionPoles for one week in three of Low Country's Burger Kings. The study received a 20 percent customer response rate.

"I found the results to be very informative, accurate and something I feel I can be used to evaluate our operation," McClain wrote in a letter to Americom shortly after the survey's completion. The device's 24-hour capability was helpful, since more than 40 percent of respondents completed the poll before 9 a.m. or after 5 p.m., hours generally considered off-hours and more costly using conventional surveying techniques.

A recent article in *Campaigns & Elections*, a national political trade magazine, cited the OpinionPole as a promising



political tool of the 90s, based on the results of an OpinionPole survey conducted by U.S. Rep. Bart Gordon, D-Tenn., and a Gallatin, Tenn. newspaper, *The News Examiner*.

Gordon's office used the OpinionPole to gather constituent input during one week last fall. Kiosks were placed in three locations—two in grocery stores and one in a discount store—in one of Gordon's county districts. Results, according to Kent Syler, Gordon's administrative assistant and former campaign manager, exceeded expectations.

"With three machines in Sumner County, we got over 1,100 responses. Our office averages about 500 constituent letters per week from our 17-county area. So, in just one week, we received over twice as many responses from the machines," says Syler, noting that over 85 percent of respondents said "yes" when asked if the OpinionPole was a good way of keeping in touch with their congress-

man.

Steve Rogers, executive editor of *The News Examiner*, expressed surprise at the high response rate and quality of data garnered by the survey. "We just wanted to see if, and how, people would respond to this kind of polling," Rogers explains as the reason the newspaper co-authored the survey with Gordon's office. "From our analysis, we got a pretty good perspective, which surprised me until I actually thought about it. We didn't choose country clubs—everybody buys groceries. So, we got a good cross-section of people. We also got information we could use for our own marketing purposes and could pass on to some of the retailers in the area."

The device's video capabilities were a major attraction, according to Rogers. "Everybody is attuned to video," he says. "People weren't scared to walk up and use it. I think you're going to see businesses use this type of device more and

more. It's a good marketing tool."

Syler also views OpinionPole as a "great campaign tool" for quickly determining how a candidate is doing or how constituents are responding to specific ad campaigns. "Its graphic abilities can give you an edge over telephone interviews," he adds. "You can actually throw a graphic of the ad up on the screen with a question underneath. The whole idea is to jog the constituents' memories, so they know exactly what you're talking about." Gordon's office is currently developing a second OpinionPole survey and has expressed interest in using the device during the congressman's next political campaign.

The Tennessee State Museum is another recent beneficiary of the new technology. "We wanted to find out who was coming to the museum, where they were coming from, and why they were coming," explains the museum's public relations

continued on p. 40

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Cultivating communication

In-depth interviews with dealers yield many benefits for farm equipment manufacturer

The Gehl Company knows the value of communication.

Through its dealer council, which consists of 16 dealers chosen from around the country, the West Bend, Wisconsin-based agricultural equipment manufacturer is able to keep abreast of changing market conditions, industry and product trends.

The company's primary market is dairy farmers, but it also markets to livestock and swine producers, manufacturing a wide range of equipment including manure spreaders, machinery for cutting and baling hay, and skid loaders.

The role of the dealer council, says Joe Ecker, Gehl's director of marketing, is to improve communication between the company and the dealers, thereby strengthening the relationship.

"We look to the council to provide Gehl management with the collective and representative judgments of its dealers concerning market conditions, current market trends, and any needs or problems that may arise between the company and the dealers," Ecker says.

"It's important to us to be responsive to our dealers because we feel very strongly that our dealers are the key to our success or failure."



In existence since 1978, the dealer council meets once a year with Gehl management. To choose the dealers who participate, Gehl sales staff around the country assemble a list of qualified dealers in their area. This list is then submitted to the regional sales managers for further review.

Many criteria

There are many criteria for qualification, as Gehl seeks to strike a balance between large and small operations, those that are established and those that are just beginning, and those operating in a range of different farming and ranching conditions. The goal is to make the council as representative as possible of the Gehl dealer universe.

"About 85% of the dealers have a tractor franchise, such as John Deere or Ford New Holland. That's just one of the factors that goes into determining the mix of the dealer council. From a research standpoint, and from a mix standpoint, they are chosen on a geographical basis as well as on a volume basis so we get a mix of high volume and low volume dealers, as well as a mix of the (equipment) lines they represent," Ecker says.

Once a dealer has been chosen to serve on the council, he sends out forms to dealers in his area which the dealers can use to indicate any concerns/interests they would like Gehl to know about and would like to see discussed at the dealer council meeting.

Ecker says that each year four or five dealers are held over to serve another term on the council to provide continuity and allow the company to follow up on actions based on the previous year's council.

One-on-one interviews

Each December, the council meets for three days at Gehl headquarters. To set the agenda for the annual meeting, and to make sure it is productive for both sides, a Gehl representative performs an in-depth, one-on-one interview with each of the dealers at their





dealership in late summer or early fall.

“We feel that doing the interview in the dealer’s bailiwick gives him a comfort zone and allows him more freedom to talk. We’re looking for objective information, and we know that if I went out to do the interview, or if someone else from Gehl went out, that the dealers might not be as candid as we would like them to be,” Ecker says.

So Gehl retains Bruce Symonds, president of the Bruce K. Symonds Co., a St. Paul based marketing consulting firm, to perform and supervise the interviews.

Symonds, who helped Gehl create the dealer council, says the interviews last about two hours, but the whole process, which includes a photo session (to show other dealers at the council meeting what their fellow members’ facilities look like) and a tour of the dealer’s facility, takes half a day.

The interview covers several areas, including:

- Dealership history and description.
- Local market information, including information on local farming and ranching trends and how this will affect future

farm equipment design and usage.

- Dealer suggestions for product design changes and/or new equipment.
- Dealer council discussion priorities in the areas of parts, service and warranty; credit and retail finance; advertising and marketing; dealer sales and service training.
- The effectiveness of sales promotions and suggestions for improving future efforts.
- Sales information by product type.
- Opinions on recent Gehl changes in product line and marketing support.
- Projections for future sales potential.
- Competitive activities and their effect on business.

Whenever possible, Symonds says he tries to interview the dealers at a restaurant or motel room, away from the distractions of their office and the constant phone calls. He says it’s important to be a good listener.

“I want them to be able to tell me anything, and I always tell them that this is for their benefit. The more open they can be, the better.”

Symonds says the one-on-ones offer

some advantages over traditional focus groups. “In focus groups, it can be very difficult to control the conversation. Some people are more talkative than others, you hear from the more aggressive people, the others you don’t hear anything from. But when we interview them one-on-one, we’re able to draw out the quiet people and get some good input from all of them.”

The survey topics change each year, in response to market trends/developments and shifts in dealer interest. If Gehl is considering operational changes such as a new marketing program, for example, or a change to a product line, it may want to use the interviews to test reactions to it.

After compiling the results from the interviews, Symonds meets with Gehl management to discuss the findings and set the agenda for the upcoming council meeting.

Review priorities

Ecker says that through the dealer council, the dealers provide Gehl with five to fifteen priorities to work on in the coming year. After the dealer council session Gehl management meets to review the priorities set by the dealers.

“We bring together all of the disciplines that are affected by the priorities, address them, discuss them, and determine which ones we feel we can act on reasonably soon, and those that will have to be dealt with in the future because of budgeting constraints, etc. We feel that it is extremely important to respond to the dealer priorities as quickly as possible and to follow up throughout the year.

"It is really a guideline to help us run the business and improve our position with the dealer. Many things have come out of the dealer council. They have given us a lot of guidance."

Pushed for finance company

For example, during the early years of the council, dealers pushed for Gehl to create a captive finance company so that dealers could complete sales to farmers without forcing the farmer to go to his local bank for financing—an extra stage in the deal-making process that often resulted in lost sales.

"It took us time to set up Gehl Finance, because it was a very big step on our part, but eventually we did it. There isn't any doubt that (the dealers') constant requests for it enabled us to show our financial people that it was a must. It has proven to be a valuable instrument for the company."

Ecker says that the dealer council has given important guidance on product quality, product mix, warranty changes, and advertising programs. For example, through the co-op advertising program, Gehl and its dealers share the cost of local



advertising.

"The council has helped us develop and enrich our co-op advertising program over the last five years and we intend to do more with it. The interviews give us information on what frequency, content, and level of participation works best. And they let us know how the dealers feel about our responsiveness to their requests."



Ecker

Three-day meeting

The annual three-day council meeting allows for interaction between the dealers and Gehl management. On the first night, Symonds and the council chairman host a get-acquainted meeting, during which the issues to be discussed with company management are decided. The following day, meetings with management give the dealers a chance to learn about the company's plans for products, training, marketing and a host of other issues.

The morning of the third day is devoted to a closed-door meeting of the dealer council, with no Gehl management present, during which the dealers finalize and prioritize the requests they will make to the company.

Recognizes value

Ecker says that throughout the council's existence, even during the agricultural recession of the 80s, Gehl has stood by the council, because it recognizes its value.

"It's not necessarily an inexpensive way to get this information, but we feel very strongly about our dealer council. We feel that it is one of the best communication tools that we have." □

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Researching the researchers

by Tom Quirk

Our first-ever survey of the qualified readers of *Quirk's Marketing Research Review* reveals some interesting information regarding their background and involvement in the marketing research process. (A qualified reader is defined as a person who has research purchasing responsibility within a company or organization that purchases, rather than provides, commercial research.)

The suggestion to undertake this study on the users of marketing research products/services and their buying habits came from Monica Smith, a member of the research department at the Xerox Company in Rochester, New York. She also provided assistance in developing the questionnaire. For this I wish to extend my thanks.

The two-page questionnaire, with cover letter and reply envelope, was mailed to 500 of our qualified readers in early January, 1990. The names were selected at random from the current mailing list. No financial incentive was included nor was any follow-up mailing made.

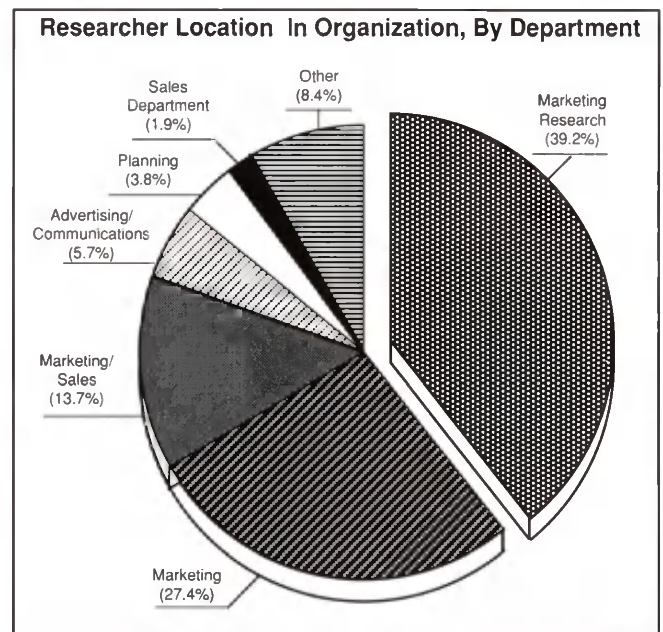
As of March 10, we had received 271 returns, of which 263 (52.6%) were usable. I appreciate the high level of cooperation.

The respondents represented the wide range of industries and organizations existing within the country; slightly more than two-fifths (41.8%) work at manufacturing companies, while the remainder work in the service sector.

A high percentage (64.7%) of the respondents have research-related job titles such as market analyst, research manager, or research director. Those without research-related titles are more likely to have marketing titles (26.2%) such as marketing director or product manager. Beyond these two categories there were a wide range of titles for other individuals who also have marketing research responsibility.

Although marketing research titles are the norm for those who have research buying responsibility, the location of these individuals within a separate marketing research department is not as common. Among the survey respondents, less than two-fifths (39.2%) are located within a marketing research depart-

ment; slightly more than that are located either within a market-



ing department (27.4%) or a combined marketing/sales (13.7%) department.

Providers of marketing research products/services bemoan the relatively high turnover of their client base, and the results of the job tenure section of this study confirm their feelings. Almost one-fourth (24.0%) have had two years or less of involvement with marketing research within their present organization, while more than half (57.0%) have had the marketing research function for five years or less. We hope, at some later date, to determine what might cause this situation.

As might be expected from the earlier information relating to job titles, when asked to break down the percent of their work time that involves marketing research, the majority of the

continued on p. 36

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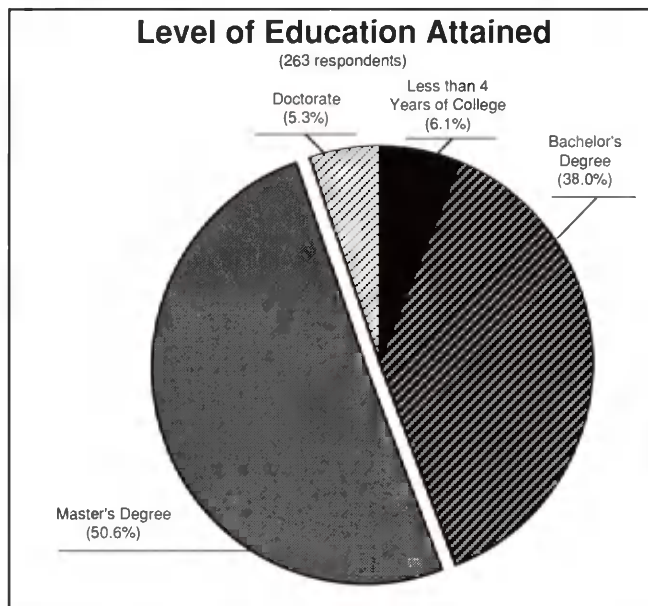
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From the Publisher

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respondents said they spend most of their time with marketing research projects. Almost half (47.5%) stated they spend 75%



or more of their time in this area, with another 13.7% spending between 50% and 74% of their time in this function.

Those involved in the marketing research function are well-educated. Over half (55.9%) have a graduate degree, and an additional 38.0% have a bachelor's degree. The most common major, as might be expected, was business.

The respondents tended to have personally worked on a wide range of research projects during the past year. The questionnaire provided a list of project types, and more than half of the respondents said they had conducted advertising studies (66.5%), customer satisfaction studies (63.1%), new product concept studies (62.7%), tracking studies (62.0%), or market segmentation studies (58.9%). And between one-third and one-half had involvement with pricing (39.9%), promotion/merchandising



(39.9%), sales forecasting (35.4%), or service issues (33.8%).

There are many different research products/services available to researchers and our respondents reported using a wide variety of them within the past year in the areas of quantitative, qualitative, data processing/software, and field services. I believe this is an indication of the research buyer's increasing

Types of commercial research products/services used during the past year (263 respondents)

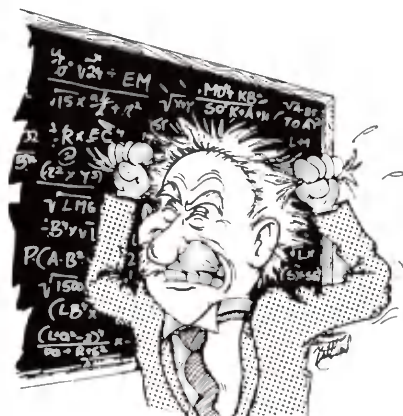
QUANTITATIVE	DATA PROCESSING/SOFTWARE
52.9% Full Service	40.7% Statistical Analysis
39.2% Syndicated Studies	36.5% Software Packages
34.6% Secondary (Excluding Demographic)	35.7% Data Processing
24.7% Multi-Client Studies	FIELD SERVICE
17.9% Panels	65.8% Telephone Interviewing
12.2% Omnibus Studies	49.8% Mail Surveys/Lists
10.3% Single-Source Scanning Services	38.4% Personal Interviewing
	22.1% Mall Intercepts
QUALITATIVE	
63.9% Focus Groups	
40.7% One-on-Ones	

degree of sophistication in customizing the methodology for each project.

More than half (52.9%) of the respondents used full service research during the past year, while more than one-third used syndicated studies (39.2%), secondary studies—excluding demographic (34.6%), or demographic information (34.6%). Other quantitative information sources listed include multi-client studies (24.7%), panels (17.9%), omnibus studies (12.2%) and single source scanning services (10.3%).

Qualitative research continues to play a major role with researchers. The importance and use of focus groups in the

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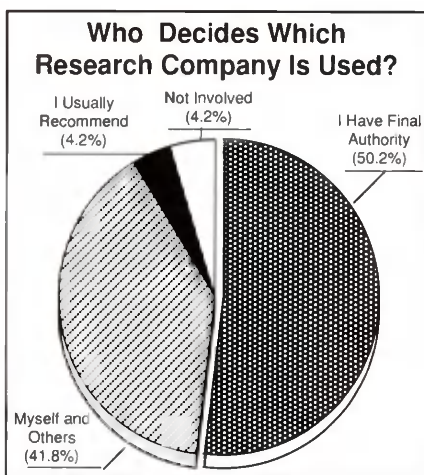
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research process is shown by the fact that almost two-thirds (63.9%) used this method during the past year. One-on-ones also are important—more than two-fifths (40.7%) of the respondents said they had used that method during the year.

Collection of raw data is still an important part of the research function. Telephone interviewing (65.8%) was the field service used most frequently in the past year, followed by mail surveys/lists (49.8%), personal interviewing (38.4%) and mall intercepts (22.1%).

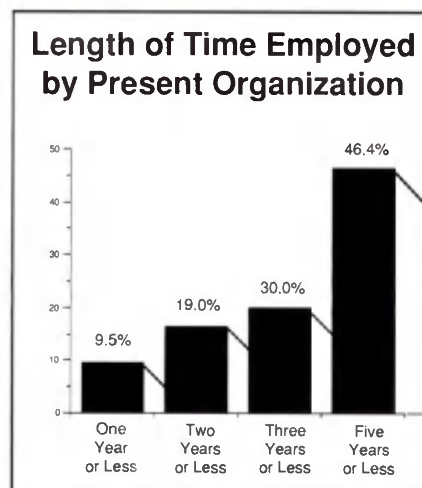
More than two-fifths (40.7%) of the respondents used outside statistical analysis services during the past year. The use



respondents normally obtain bids are omnibus studies (46.9%), one-on-ones (46.5%), demographic information (33.0%), data processing (30.9%), statistical analysis (29.9%), software packages (28.1%) and secondary information—excluding demographic (25.3%).

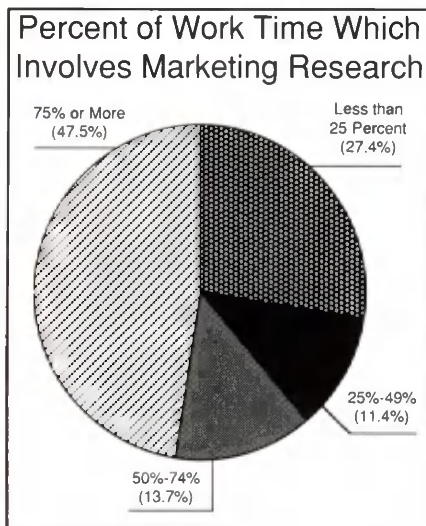
When asked about their influence in determining the research methodology used and the research provider chosen for each project, the respondents indicated that they play a very important role. Over half say they usually have final authority on the methodology used (52.1%) and the company chosen (50.9%). About two-

fifths of the respondents say they share the responsibility for determining the methodology (39.2%) and the research



company (41.8%) with others. This finding points out the central role our readers play in this part of the information gathering process.

This study is the first of several we plan to conduct to better understand how the marketing research process functions within organizations and to learn more about the people who have responsibility for it. If you have any suggestions for future survey topics, please let us know. □



of in-house processing and data analysis is also evident in the fact that more than one-third (36.5%) purchased or leased software packages during the year. And almost the same percentage (35.7%) used outside data processing services over the last twelve months.

Price and quality of research products/services are apparently important considerations when selecting suppliers, according to our respondents. Competitive bids are the rule rather than the exception for the most widely used types of research. It may reflect both the need to control costs as well as the ability to select the best product/service for the specific research project.

Among those respondents who indicated use of specific types of research during the last year, 83.5% normally obtain competitive bids on full service studies, focus groups (74.7%), telephone interviewing field service (68.2%), personal interviewing field service (55.4%), mail surveys/lists (54.2%), and mall intercepts (53.4%). The services for which between one-quarter and one-half of the

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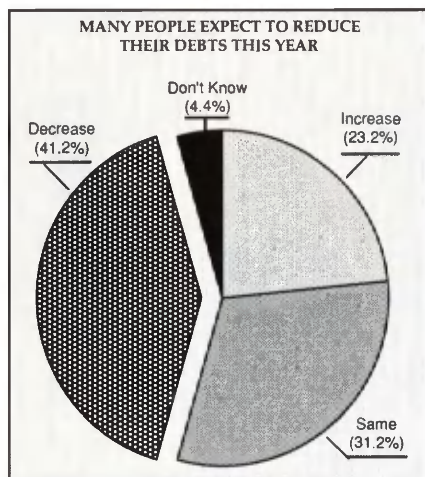
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Survey Monitor

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are neither good nor poor. On the other hand, only 18% of people believe condi-



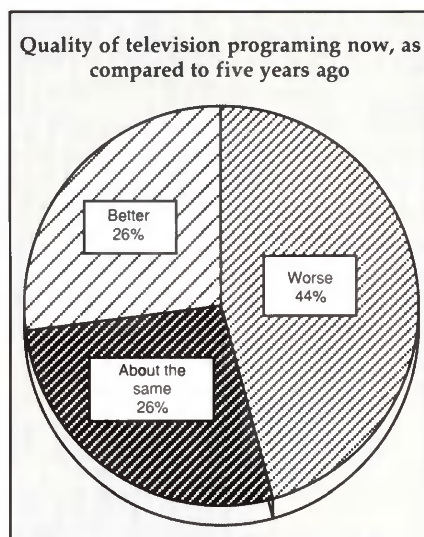
tions are poor, with 5% classifying them as very poor. The poll shows only slight differences between how men and women rate the economy.

When asked to compare their feelings about the national economy now with last year, 28% said they feel more positive. Another 38% told interviewers their feel-

ings have not significantly changed; whereas 25% said they are feeling more negative. A greater percentage of men than women feel more positive about the economy this year.

Survey finds TV quality has declined

According to a new survey by the Barna Research Group, almost half of all American adults believe the overall quality of television programming is worse today than it was five years ago, and many believe it will continue to decline in the next five years. Forty-four percent said television programming is worse than five years ago, while 26% felt it was



better than in 1985, and another 26% felt it had not changed significantly.

The perception of TV's quality hinged greatly on who was answering the question. Women were more likely than men to feel that TV programming was not as good as in 1985 (50% to 36%). In addition, young people were more positive toward the quality of television programming today than were older people. While only 24% of the 18 to 24 year-old respondents felt TV had gotten worse since 1985, 41% of the 25 to 44 year-olds felt television quality had declined during this time. Forty-nine percent of the people between the ages of 45 and 64 felt this way, and 64% of the respondents who were 65 or older said the quality of programming had dropped in the past five years.

The presence of cable television in the

household did not seem to make a difference in how people felt about the quality of television, but the presence of a pay channel did. Among people who subscribed to one or more pay channels (such as HBO, The Disney Channel, or Showtime), 33% felt the quality of television is higher today than five years ago, while 23% said it is not much different, and 41% felt it is worse (compared to 22% better, 30% the same, and 45% worse among basic-cable only households, and 22% better, 26% the same, and 46% worse among non-cable households.)

Respondents were divided on the possibility of television programming quality improving by 1995. Thirty-two percent were optimistic, saying they felt it would improve in the next five years. Twenty-six percent felt there would probably not be much change in the quality, and 33% felt the situation would only get worse.

Not only were pay channel subscribers more positive toward the quality of programming right now, but they were also more optimistic about the near future. Forty-one percent of the surveyed pay subscribers felt TV programming quality would improve over the next five years, while 23% didn't foresee much change, and 28% said it would decline (compared to 27% better, 28% the same, and 34% worse among basic-only and non-cable households).

The respondents were not as negative about news reporting and the coverage of newsworthy events. Forty-eight percent said news coverage had gotten better since 1985, while 17% felt it was not as good as five years ago, and 31% had not noticed much difference.

Public is increasingly critical of advertising

According to a recent study by Opinion Research Corp., the public opinion is increasingly critical of advertising. In 1987, a clear majority (72%) of the public found advertising to be at least fairly believable. Now, that majority has dropped to 62%. More than a third (35%) of the population considers advertising to be fairly or very unbelievable, up from 26% in 1987.

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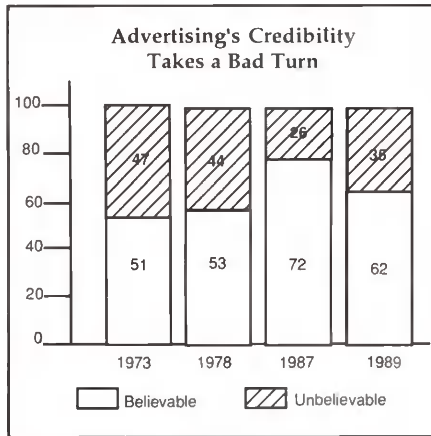
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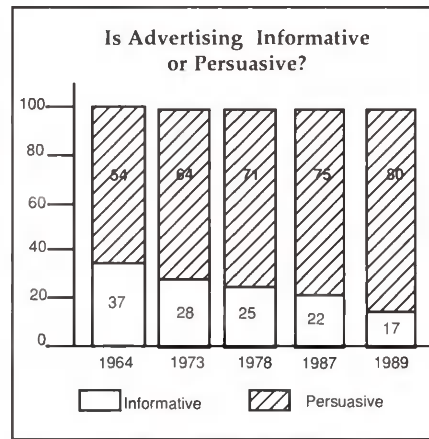
Furthermore, more than four out of ten (44%) people think advertising has become more deceptive in the last four or five years, with about the same propor-



tion (43%) saying advertising's level of deception has not changed. Of those who think advertising is as deceptive as it was a few years ago, 33% of them find advertising to be at least fairly unbelievable anyway. A scant 6% think advertising has become less deceptive during the same time, and only one in twenty-five (4%) believe advertising is not deceptive at all. These results seem to suggest that the claims companies make in their advertising have not lived up to the experiences of the nation's consumers.

quality of advertising has not changed in recent years already think advertising is annoying.

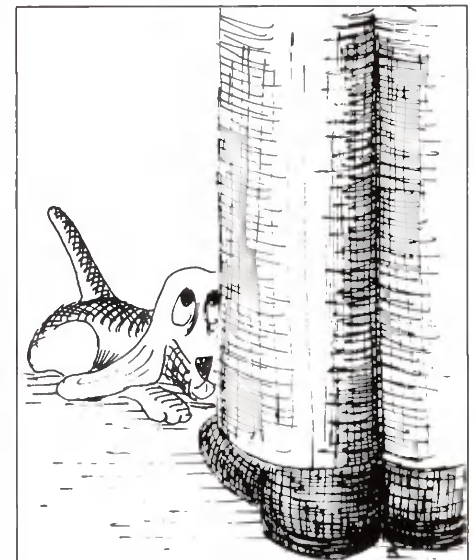
The clearest trend in people's attitudes toward advertising appears in its perceived goal. In 1964, when Opinion Research first assessed this issue, 37% saw advertising as a useful source of



information; now, fewer than one in five (17%) see most advertising as a source of information to help them decide what to buy. Today, a more sophisticated and better educated population thinks differently. The vast majority (80%) of the public sees advertising as a deceptive persuader. These proportions are the most

tising (13%) taking second and third place, respectively.

Television and newspapers share the honor of being considered the most believable (34% and 31% respectively) and the most informative (television, 32%; newspapers, 30%). The public gives its lowest appraisal to mail advertising, a medium which seems to be used more frequently with each passing month. Mail advertising is considered most believable by only 3%, and is also considered to be among the least informative advertising media.



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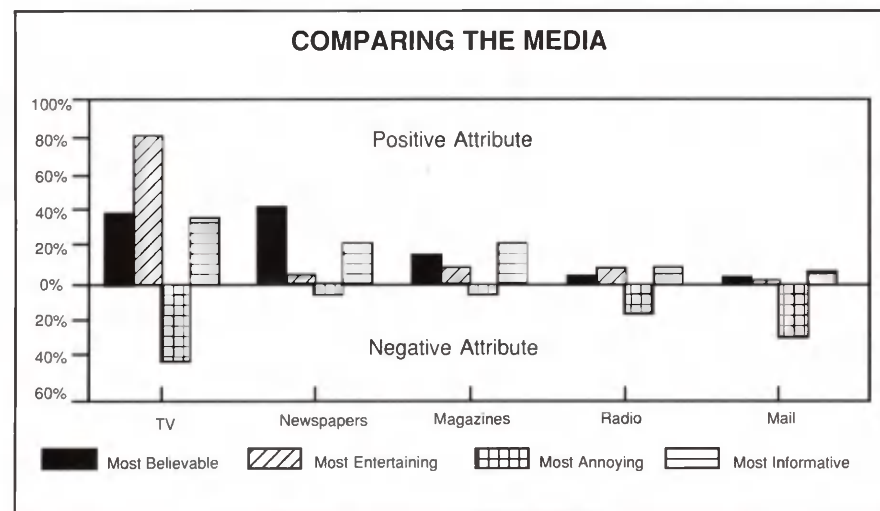
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Along with a loss of credibility, advertising is also losing ground on the issue of quality. A 1987 study found that 41% of consumers felt the quality of advertising had gotten better in the preceding four or five years; now only 35% feel the same way, with 26% saying advertising has gotten worse. The criticism runs deeper than the above data indicate: a clear majority (53%) of those who say the

extreme in a quarter of a century.

While comparing advertising in specific media—television, newspapers, magazines, radio, and the mail—television is chosen overwhelmingly as the most entertaining and interesting of choices (79%). However, nearly half of consumers think television advertising is also the most annoying (47%), with mail advertisements (23%), and radio adver-

OpinionPole

continued from p. 25

officer, Paulette Fox. Survey results, which garnered a 10 percent response rate over a two-week period, provided that information, while enhancing the museum's mailing list. "People seemed willing to give their names and addresses, which gives us an ideal mailing source for our membership solicitation, a list of people we know are interested in the museum."

The OpinionPole is new methodology, and even Americom is learning from each new application. "What we're learning from the data already accumulated is that there is clearly a consistency over many environments," says Telser.

One client who would like to experiment more with the medium itself is Northern Electric, a national electronic appliance manufacturer, which recently used the OpinionPole to test consumer reaction to two new product ideas.

For this study, OpinionPoles were placed for a two-week period in two K-Mart stores—one in Chicago, one in Johnson City, Tenn.—where Northern Electric appliances are sold. George Rissmann, Northern Electric marketing research manager, was impressed with the

"lightning speed" at which results were obtained, the large sample size and low cost. But added one reservation—OpinionPole's self-selection, which refers to the type of person that responds to a specific type of survey method.

"All surveys, i.e., telephone, mail, or mall, have self-selection. The OpinionPole is not different," says Rissmann. "I'd like to experiment more with the OpinionPole, to find out what type of person responds to its methodology. Overall, however, I think it holds real promise for the future."

K-mart officials were less reserved in their enthusiasm of OpinionPole's potential. In return for allowing the OpinionPole to be placed in its stores, K-Mart was allowed to conduct its own survey at the end of Northern Electric's survey. More than 850 completed responses were gathered during the two-week period.

"We were very impressed with the response rate for that period of time," says Christal Renaud, K-Mart Corp. consumer research project manager. "The customer reactions were very positive and our employees weren't irritated by (OpinionPole's) presence." K-Mart is currently considering using the OpinionPole again for further consumer polling, says Renaud. □

Product & Service Update

continued from p. 22

New health care omnibus program

Total Research Corp. introduces a new omnibus research program that will monitor the attitudes and opinions of primary care physicians with results on both a monthly and quarterly basis. The new service, Synergy, will track physicians' product awareness and usage, test product and promotion concepts, measure demand, and monitor the impact of current events.

The new research service will be offered in two forms. The first is Synergy-Stat, a monthly survey of 100 primary care physicians. This is a research vehicle for clients who want to pose a short series of proprietary questions.

The second is Synergy-Pulse, a quarterly service designed to provide a detailed analysis of current topics in the health care industry. Three hundred physicians will be interviewed each quarter and the results will be syndicated to subscribing companies. The first study will examine physicians' attitudes toward the changing face of pharmaceutical companies' sales practices.

Directory lists non-official worldwide data sources

Euromonitor's new International Directory of Non-Official Statistical Sources provides information on over 1,000 titles published by various associations, companies and non-official bodies in the U.S., Canada, Japan, Australasia, India, the Middle East, South America, and Africa.

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Menendez International has relocated its offices to 8931 SW 85th Street, Miami, FL 33173. Telephone 305-598-2829. Fax 305-598-4899.

A new custom marketing research firm, **Research Plus**, has opened at 1821 Walden Office Square, Schaumburg, IL 60195. Telephone 708-303-5655. Herb Hupfer and Carolyn Heimbach are the principals.

Jill L. Siegel is the new owner and president of **Olchak Market Research**. She has purchased the 20 year-old field service from its founder, Rhoda Olchak, who will remain as a consultant to the



Siegel

company. The company is located in the greater Washington, D.C. area.

Charles Schwartz, a demographer specializing in marketing research and information systems, has formed **Demometrika**. The company performs demographic and statistical analysis of market research data ranging from market demographics to consumer preference mapping. The company's address is P.O. Box 66689, Los Angeles, CA 90066. Telephone 213-390-6380.

MarketVision Research, Inc. has opened a new division, MarketVision Consulting, which will have offices in Cincinnati, and Charlotte, NC. The firm's primary focus will be the implementation of customer satisfaction research programs. Ronald W. Miller has been named president. He will work out of the Charlotte office. For more information, contact Donald McMullen at 513-733-5600.

ACG Research Solutions has opened a new focus group facility in Clayton, MO. ACG is located at 120 South Central, Suite 1750, St. Louis, MO 63105. Telephone 314-726-3403. Fax 314-726-2503.

Erdos & Morgan, Inc. and Marketing Projects Group (MPG) have merged

to form **Erdos & Morgan/MPG**. The company is headquartered at 116 East 27th St., New York, NY 10016.

Randy Thaman and Dave Disher, both senior vice presidents of **Marketing Research Services, Inc.**, have contracted to purchase the company from its founder



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Hawk

continued from p. 7

the first group, each with its own set of concerns and interests. “We found we had two distinctly different audiences and each audience had some unique reasons for interest in the product, and we never would have assumed that that would be the case,” Gorrell says.

The first segment, made up of people such as building owners, developers, and office complex managers, were interested in operational efficiency issues such as cost savings and return on investment. The second segment, the boiler operation/maintenance personnel, were interested in ease of use issues, and also in the operational and functional benefits. Both segments shared a fundamental interest in safety.

“We thought we might be talking to more than one audience but we found we really had two different types of marketing messages to convey because there were two distinctly different reasons for different types of people to want this product,” Gorrell says.

Other changes made

Subsequent focus groups separated the two segments to better investigate their individual needs and viewpoints. And based on the results of the initial meeting, other changes were made.

Frank Pleticha, vice president of the AdFacts research division of Starmark, says that the results of the first group led to a rigorous screening procedure for the second set of groups (preceded, he says, by “a ton of phone calls” to get respondents who fit the requirements).

“I think our screening process was much more rigorous and we ended up with better groups as a result of what we learned in our first pilot group. Initially we had a mix, some people would respond to some issues and some to others, and it was very hard to get a reading on what the group was telling us, which is when we realized we had two different audiences and we should treat them as such.”

The screening questionnaire asked about the technology of the boilers the respondent was currently working with, to assess the respondent’s level of familiarity with boiler technology, his ability to articulate his thoughts and views, and to



uncover thoughts and perceptions towards that technology.

“We needed to know how what their unmet needs were and how this new product would potentially fill those needs. And there was the overall question of how do we position this thing so that it is seen by the marketplace as filling the gap, but at the same time it’s not seen as some kind of frightening *Star Wars* thing that makes outlandish claims,” Pleticha says.

Changes were also made in the method of presenting and discussing the product. In the first group, the product was explained verbally, which posed problems, Gorrell says, because of its new technology.

“One of the things we learned in our control group was that it was confusing to try and talk about (the product) without any representation of the product itself. Respondents would say, ‘I don’t understand how this can be,’ and, ‘What are we talking about?’”

Succeeding groups used a detailed slide show to explain the product’s features. A prototype of the Hawk, placed in a cabinet with no identifying markings, was also used to give respondents a concrete idea of what the product looked like and how it worked. Representatives from Honeywell and Cleaver-Brooks were on hand in addition to the moderator to answer specific technical questions and clarify any respondent misperceptions.

“Not only did the respondents see the slide show and ask all the technical questions, but with the prototype, they were able to walk up to this thing and kick its tires so to speak and play with it, look at the buttons, and ask questions,” Pleticha says.

Pricing was also discussed, after the slide show and the unveiling of the prototype, using four questions:

1. What would you expect this product to cost?
2. What price would be so high that you feel you would be getting cheated?
3. What price would be so low that you would question the product’s quality?
4. What price would you be willing to pay?

Respondent fears

As in the first group, the second group respondents expressed fear about the product because of its advanced capabilities, Pleticha says.

“The depth of the fear and resistance to it were just incredible. In the early minutes of the group, that really came out in a powerful way. We kind of sensed going in that there would be a little hesitation, but in the three groups we did it was overwhelming. It smacked us in the face. We knew this thing had to come across as looking friendly,” he says.

Some of those fears surrounded the Hawk’s ability to allow off-site boiler monitoring through the communications module.

“Many of these guys came from an environment where, by golly, if you had a ten hour shift, you walked around those boilers for ten hours and you had your eye right up to the gauge. They said, ‘You’re going to tell me that I can be a mile away at a different location and this thing is going to give me accurate readings and it’s going to shut the boiler down if the pressure gets too high?’”

“They also asked, is this the type of thing that would work so well that I’d have to fire my good friends that I’ve worked with for the last three decades because it would take their jobs away?”

The people who had had experience with computer microprocessor-based technology grasped the product concept very readily and embraced it enthusiastically, says Steve Connor.

“Those that had not been exposed to this kind of technology gradually came to see the benefits, but they remained a little hesitant. There were also some people that you could tell ten minutes into the presentation were afraid of it. It wasn’t for them. That was very helpful because we knew that the product wouldn’t just sell itself. We weren’t going to have a market that was lining up outside our

door to buy the product. It would have to be sold," he says.

Strong image

Uncovering this fear made it clear that the product would have to have a strong image that communicated safety. The first step in creating that image was the product's name.

Analysis of competitive ads showed that other manufacturers tended to use technological-sounding names, Pleticha says. "Most of the ads simply showed a black box sitting on a table with a caption like, 'Here it is! The XG47R.' But to make this product successful, we knew we couldn't use that approach. We had to do something that would really make people stand up and stop dead in their tracks and take notice."

Steve Connor: "Because the (respondents) put an emphasis on safety, we knew we had to give it a name that connotes a rugged piece of equipment, a state of the art system that gives you a feeling of security."

Enter "The CB-Hawk," and the slogan "No other control watches your boiler like a hawk." To create a striking image that would reinforce the product name across all aspects of the promotional campaign, Starmark used wildlife artist Lisa Bonforte's painting of a red-tailed hawk.

Information from the research was used directly in the creation of the promotional materials.

"Everything we talked about (in the promotional materials) relative to the features, functions and benefits—enhanced safety and control, advanced diagnostics and communication capabilities—was tied to and confirmed by the focus groups," Connor says.

Rhonda McCusker, Cleaver-Brooks marketing communications manager, says that she used the focus groups to clear up a number of issues related to the design and content of the advertising and product brochure.

"We were introducing a product that not only was new to the marketplace but very new for Cleaver Brooks. We had never entered the controls market per se so we needed to look at which markets were out there. I wanted to specifically know how to prioritize or position this product, and from the focus groups we needed to know what features and benefits would turn our buyer on. We had a list



of 10 or 12 features and benefits but we weren't sure how to prioritize them," she says.

Very successful launch

Connor says the Hawk had a very successful launch in terms of sales and overall awareness. And Starmark's extensive communications program earned it an award in the "Top 10 Case Studies" competition sponsored by the St. Louis chapter of the Business/Professional

Advertising Association. The competition, based on a program's ability to produce measurable results, solicited entries throughout the U.S. and Canada.

While the focus groups were being conducted, Cleaver-Brooks performed field tests of the boilers with sample customers, so that by the time of the product's unveiling at the annual show of the American Society of Heating, Refrigeration and Air Conditioning Engineers (ASHRAE), it could point to successful field installations. "This helped cut down the anxiety for the first time buyer," Pleticha says.

Videotaped segments of the focus groups were shown to the Cleaver-Brooks sales force to give them an indication of the kind of reactions and potential objections they might encounter in the field.

To further increase awareness, Cleaver-Brooks has also made the Hawk standard equipment on a number of its boilers.

"Some of the operators were leery at first," Connor says, "but it's been amazing the number that have come back to us and said, 'Hey, what's it going to cost to put one of those Hawks on my other boiler?'" □

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Corrections

The following focus group facilities were inadvertently omitted from the 1989 Directory of Focus Group Facilities:

Strategic Marketing Services, Inc.
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1,3,4,6,7B

FacFind, Inc.
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Charlotte, NC 28211
Ph. 704-365-8474
Fax 704-365-8741
1,3,4,6,7B

The Customer Center
3528 Vest Mill Rd.
Winston-Salem, NC 27103
Ph. 919-722-8868
1,2,7C

Research Options
521 Plymouth Rd., Suite 107
Plymouth Meeting, PA 19462
Ph. 215-828-2390
Fax 215-828-2498
1,3,4,7B

Phoenix Systems, Inc.
525 W. 22nd St.
Sioux Falls, SD 57105
Ph. 605-339-3221
1,3,7B

Dallas Focus
511 E. John Carpenter Fwy., Suite 100
Irving, TX 75062
Ph. 214-869-2366
Fax 214-869-9174
1,3,4,6,7B

ACG Research Solutions
120 So. Central Ave., Suite 1750
St. Louis, MO 63105
Ph. 314-726-3403
1,3,6,7B

American Financial Group
3033 Campus Dri., Suite A400
Plymouth, MN 55441
Ph. 612-557-0386 or
800-343-8891
1,3,6,7B

Peters Marketing Research, Inc.
12400 Olive Blvd., Suite 225
St. Louis, MO 63141
Ph. 314-469-9022
1,3,6,7B

Please make the following correction to the 1989 Directory of Focus Group Facilities:

The fax number for First Market Research Corp., Boston, is 617-482-4017.

The following listing was inadvertently omitted from the 1989 Directory of Permanent Mall Research Facilities:

Brewer Research
Pioneer Plaza
1173 N. Circle Dr.
Colorado Springs, CO 80909
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Trade Talk

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More detail

Tourville says that though some of the information contained in the Purchasing Study may also be found in other sources, such as government reports, the study offers more detail than



those sources while providing users with a broad overview of the industry.

"What's odd about this business is that there are many comprehensive dollar figures available for the industry, but they're not very detailed. Our study supplements that information. Other surveys may do an in-depth analysis of a very narrow topic, but that's all they do. We cover a wide range of

products and services."

The services covered in the study change from year to year as the industry changes. Tourville says users also request areas they would like to see examined. "We'll notice just by the types of phone calls we're getting and the types of advertising we're seeing elsewhere that something is becoming a hot topic."

An example of such a topic is facilities management, where an outside firm will buy an institution's data processing equipment, hire its data processing employees, and charge the institution a monthly fee to handle its data processing.

"We began to see a sprinkling of ads about it, and we had requests from advertisers for information on it in a study a couple of years ago. We also saw that the number of S&Ls who were going the facilities management route was still small, but it was doubling every year."

Jack Davis, president, Hagen Marketing Systems, uses the study to keep his client, Computer Power, a mortgage servicing company, up-to-date on market trends.

"I use the study because it's timely and accurate. They do the leg work and present the data in a form we can use and understand. I use a lot of secondary data from a variety of sources to keep my client abreast of early indicators that show potential changes in market direction. It's important from a competitive point of view and from a research point of view to get that data as soon as possible.

"(Computer Power) is involved in residential mortgage originations, and the study's trend data shows us over time what's going on in the various segments of that market. As the thrift industry goes through all its changes, it's important for us to have a way to monitor those changes." □

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by Joseph Rydholm
managing editor



Study tracks trends in S&L industry

Along with its many activities on behalf of the savings institution industry—from lobbying, economic analysis, and legal consulting—the United States League of Savings Institutions, a trade organization founded in 1892, also provides its members with extensive industry research. One part of that effort is the annual Purchasing Study sponsored by *Savings Institutions* magazine, the League's publication for its members.

Performed since 1972, the study examines the use of various products and service in four areas: management, lending, savings/checking, and data processing. In each of the areas, respondents provide purchasing histories and predictions for future purchasing for the products and services.

For example, the report on Savings/Checking looks at the level of use of ATMs, and which institutions offer passbook and/or statement savings accounts, etc. The Lending report examines the number of institutions that currently offer or plan to offer education loans, bi-weekly mortgage loans; those that issue credit cards, either as an issuer or as an agent; and the types of real estate owned by property type.

Many uses

The study has many uses—as material for *Savings Institutions* articles, U.S. League clinics and seminars, and as a reference source for many financial institutions—but Glenn Tourville, assistant marketing director, *Savings Institutions*, says that the survey was created to provide *Savings Institutions* advertisers with detailed, quantitative information on the market.

“It's also very valuable to our advertising sales representatives because it gives them information on several aspects of the market that they can pass on to advertisers. It's sort of the GNP of the savings and loan industry.”

The results of the latest study, the 1988-89 year, are based on 1760 interviews with institution managers who are directly responsible for the institution's operations in the four areas surveyed. Interviews were conducted with 440 respondents for each of the four sections, and those segments were broken down by the assets of each institution.

continued on p. 45

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Manager, ICI Pharmaceuticals
2. **Outstanding!** Will recommend for the entire professional staff at Ford. Extremely helpful for doing my job. Excellent, well laid out (manual).
Project Manager, Ford
3. **Fabulous** seminar. Covered a wide range of difficult information in only three days. I felt a very personalized learning experience — all due to the (speakers) vibrant, one-on-one communication style.
President, Marketing Consulting Company
4. **Excellent** — Covered more information in more detail and certainly more immediately useful methodology than the two semesters of business research methodology that I had just completed in an MBA program. Exciting, energetic, knowledgeable and effective presentation.
Opportunity Analyst, Dow Chemical
5. **Fantastic!** Even though I have an M.S. in stats, I have never had such a clear picture of how to apply stat techniques before. Wonderful examples to explain the theories, ideas, philosophies — superb (speaker)! Helped to motivate me to expand my use of different techniques and explore more possibilities.
Market Research Analyst, Consumer Power Company
6. **Great** seminar. Concentrated — practical — directed. Engaging (speaker) — it is exciting to have direct contact to such talent.
Market Officer, Marine Midland Bank
7. **Excellent** — exactly what I was looking for. No doubt that (the speaker) knows material inside and out, easily accessible, applied situation in real life to what we were learning.
Project Manager, Procter & Gamble
8. **I can't say enough.** I am much more prepared to understand the analysis needs and interpret the results effectively. Thank you. Nothing was a waste of time.
Assistant Manager, AT&T
9. **Outstanding** seminar: I learned a great deal and this seminar tied together a great deal of information that I had been exposed to but never trained in. Outstanding (speaker) used a lot of analogies that helped with the understanding of a lot of concepts. This course made marketing research more interesting to me.
Market Planner, Corning Glass Works
10. **Covered exactly the kinds of issues** we face in advertising research, and more important, the material was made very understandable because of the context in which each tool was described. The speaker can't be beat.
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