Quirk's MARKETING RESEARCH *Review*

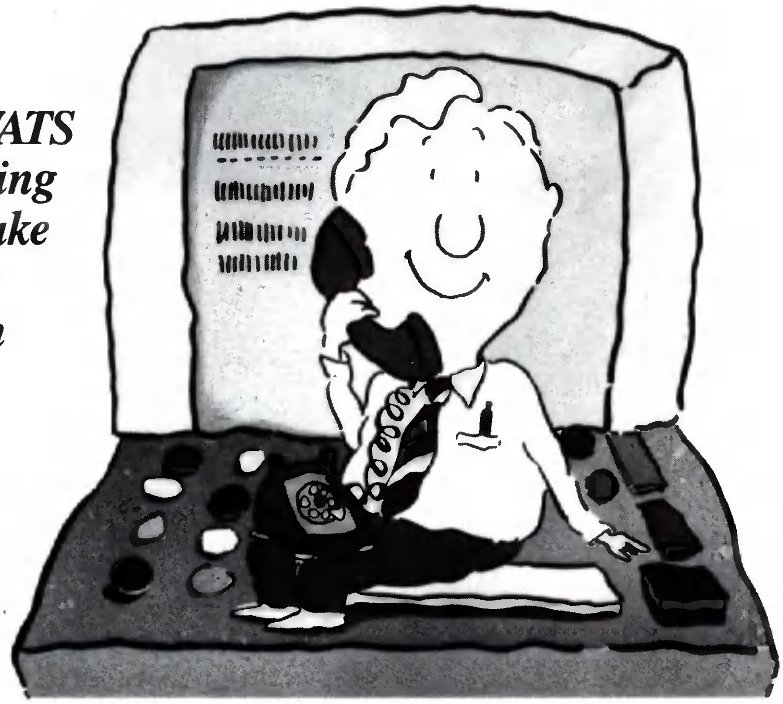
Chick-fil-A uses research to fine-tune its spring promotion

Syndicated/omnibus research issue

June/July, 1991

We Make House Calls & Business Calls
Over A Million Times A Year.

A full network of WATS telephone interviewing research centers make Equifax Quick Test the one to eall when you need to eull.



For over 2 deeades, more research professionals have turned to Equifax Quick Test Opinion Centers for data collection. Our 4 sophisticated WATS Telephone Interviewing Centers in Bethlehem, Pennsylvania; Greensboro, North Carolina; Norfolk, Virginia; and Cincinnati, Ohio are staffed by highly qualified and well trained interviewers who know how to stay on top of your job and get it done right. What's more, each center features private interviewing booths plus client monitoring rooms so you can listen in. In fact, we can even arrange for off-site monitoring if you wish.

But that's not all. Our computer assisted telephone interviewing allows for questionnaire programming and daily topline results.

Naturally, before we can begin making calls for you, we need you to call us for an information brochure or project bids. Call now and we'll tell you why Equifax Quick Test Opinion Centers has been so well-connected for so long.

Call us for more information:

212-682-1221 • 215-861-8880 • 513-772-0134

EQUIFAX

The Information Source

QUICK TEST
OPINION CENTERS

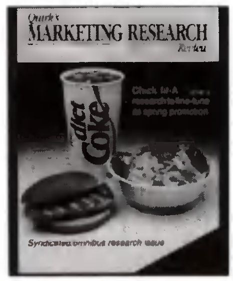
Circle No. 501 on Reader Card

Quirk's
MARKETING RESEARCH
Review

Vol V, No. 6 June/July, 1991

Cover

Chick-fil-A used research to develop its spring promotion. Photo courtesy of RHK Advertising. (diet Coke is a trademark of the Coca-Cola Company.)



Contents

Departments

Publisher
Tom Quirk

Managing Editor
Joseph Rydholm

Marketing Associate
Evan Tweed

Circulation Director
James Quirk

Business Manager
Marlene Flohr

Quirk's Marketing Research Review, (ISSN 08937451) is issued 10 times per year-January, February, March, April, May, June/July, August/September, October, November, December-by Quirk Enterprises, Inc., 6607 18th Ave. So., Minneapolis, MN 55423. Mailing Address: P.O. Box 23536, Minneapolis, MN 55423. Telephone & Fax: 612-861-8051.

Subscription Information: U.S. annual rate (ten issues) $40; two years (20 issues) $76; three years (30 issues) $112. U.S. single copy price $10; Canada and foreign countries $15.

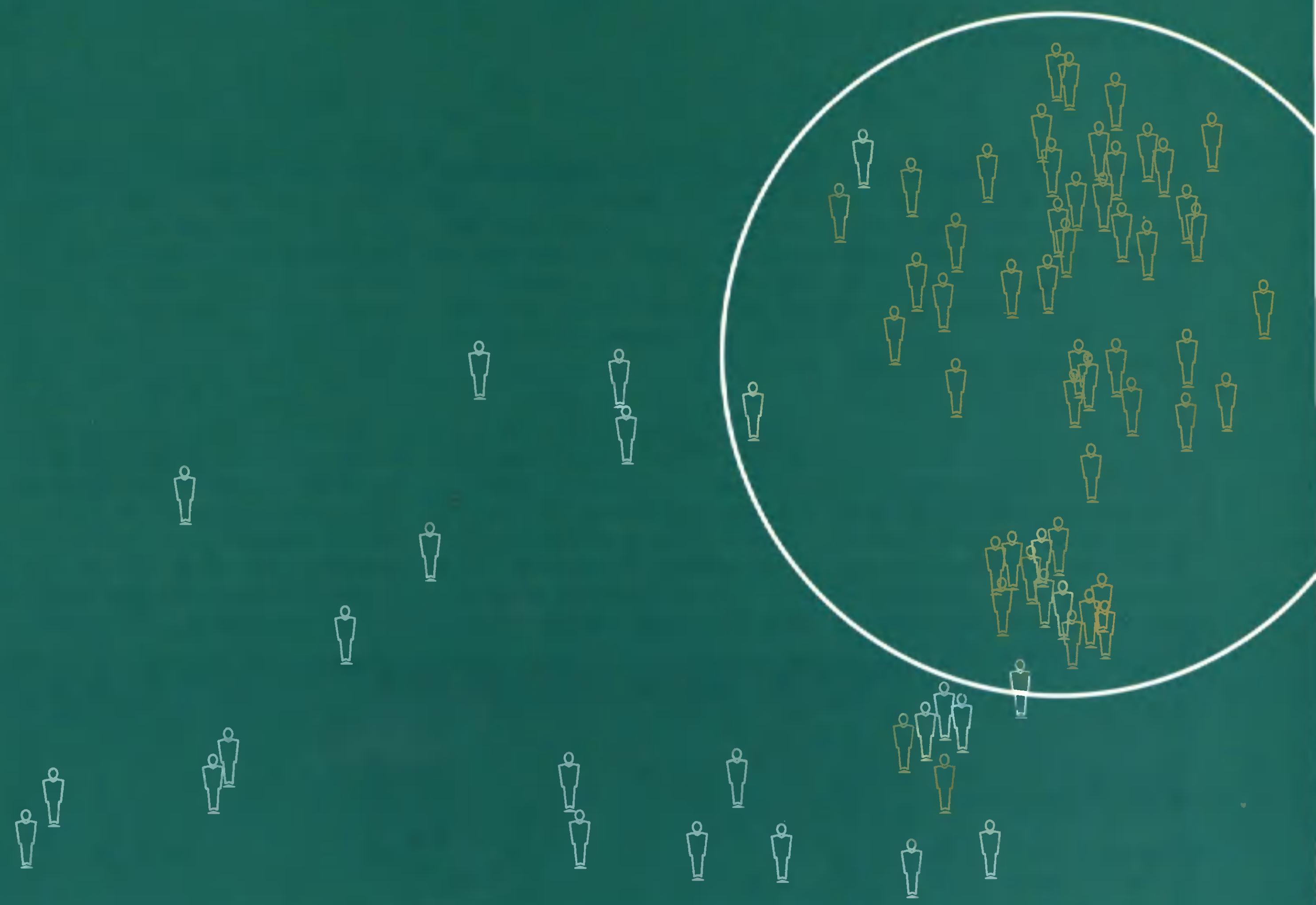
Second class postage paid at Minneapolis, MN and additional mailing offices.

Change of Address: Notices should be sent promptly; provide old mailing label as well as new address; include ZIP code or postal code. Allow 4 to 6 weeks for change.

POSTMASTER: Please send change of address "Form 3579" to Quirk's Marketing Research Review, P.O.Box 23536, Minneapolis, MN 55423.

Quirk's Marketing Research Review is not responsible for claims made in advertisements.

Editorial policy: We welcome submission of manuscripts from outside sources. Write or call for guidelines. Address press releases and other editorial material to Joseph Rydholm, managing editor.



Getting lite right

Chick-fil-A uses research to

by David Robertson

Editor's note: David Robertson, APR, is director of public relations for Rollheiser, Holland, Kahler Associates, Inc. (RHK), Omaha. Following submisson of this article, RHK merged with Miller Friendt Ludemann of Lincoln, Nebraska to form Kahler Friendt & Partners, a full-service marketing communications firm.

Chick-fil-A is the nation's third largest chain of chicken restaurants, with nearly 450 units in 31 states. Its original sandwich has been rated number one for the past eight years against other major chicken sandwich restaurants in Chick-fil-A's nationwide tracking study. Its Chargrilled Chicken Sandwich received the top rating in 1990 against other broiled and grilled chicken sandwiches.

Planning for the spring, 1991 Chick-fil-A promotion began in April, 1990, when an account team from the Omaha-based advertising and public relations agency Rollheiser, Holland, Kahler Associates (RHK) traveled to Chick-fil-A headquarters in Atlanta. According to Jeff Kahler, president of RHK, the purpose of the visit was to discuss Chick-fil-A's annual marketing objectives. "Once we had a clear understanding of the direction Chick-fil-A wanted to pursue, we could begin to prepare supporting campaigns. And that would include conducting periodic research to ensure we remained on the right track," he says.

One of the first research efforts involved a panel of Chick-fil-A store operators. "Every four months, Chick-fil-A gathers a panel of 10 to 12 operators from around the country and asks them what customers are looking for in terms of product and special offers," says Rebecca Finn, senior account executive, RHK.

The panel typically covers a broad spectrum. For example, it would include operators from units as diverse as Peachtree Center in Atlanta, where customer awareness of Chick-fil-A is very high, and units

Focus group respondents told Chick-fil-A that the "Buy 2, Get 1 Free" promotion was effective.

fine-tune its spring promotion

like Sioux City, Iowa, where the Chick-fil-A name is not quite as well known. Moreover, the Peachtree Center unit is patronized heavily by business people, who stop in for breakfast and lunch, while the Sioux City unit serves a more family-oriented clientele. The panel also included representatives from free-standing units along with those from malls. More than 400 of the chain's units are located in shopping malls.

Reflecting ideas developed at the most recent panel of operators, the April meeting decided on a campaign emphasizing menu variety. The sales promotion would feature the client's line of desserts through point-of-sale advertising and coupons and would include a special beverage offer (a free drink with the purchase of any Chick-fil-A sandwich).

In Omaha, RHK developed four promotional dessert themes for the client's consideration. Each idea was supported with copy and a rough graphic layout.

Operator experience considered

RHK presented these ideas to Chick-fil-A in June. By then, however, operator experience had shown that dessert sales over the spring were lackluster, indicating that a special promotion would not be particularly successful. "The operators told us that desserts just didn't attract much attention to a chicken sandwich-based restaurant. They doubted that a coupon-based promotion would make a significant difference, and they reported that it took an excessive amount of time for their crews to make up the desserts," Finn says.

Operator input suggested that a free beverage would also be an inadequate incentive to draw infrequent patrons to their units. On the other hand, the operators strongly supported any promotion that would focus on the chain's highly rated chicken sandwiches and salads. Emphasis would also underscore the low-calorie nature of the chain's line, they suggested.

According to Steve Robinson, Chick-fil-A's vice president of marketing, this direction was right in line with other research on what Americans eat. "Habits are changing—more and more people are nutrition-conscious and figure-conscious, so it seemed logical to focus on the low-calorie line."

Robinson also notes that women are typically more frequent mall shoppers during the spring than men. "With a customer base of women between 18 and 49, a springtime promotion pushing our good-tasting, low-calorie chicken sandwiches and salads made perfect sense."

RHK presented several new themes to Chick-fil-A in August. All highlighted the healthy nature of chicken sandwiches and chicken salads and included discounts and coupon incentives. After discussions with Chick-fil-A's marketing department, a combination of themes emerged.

Sensing that the client was comfortable with the direction but not entirely certain about the theme, RHK continued to develop fresh approaches. In late Au-

continued on p. 39

Making fast food *faster*

Arby's and MIS use research in development of new customer order entry system

by Joseph Rydholm/managing editor

Despite offering competitive wages and, in some cases, benefits, many fast food chains are having trouble attracting and keeping employees, a situation that most sources indicate will only worsen in the coming years as the labor force shrinks. The labor shortage and the industry-wide price cutting that is slicing already thin profit margins are forcing many fast food chains to use the employees they do have more efficiently while keeping service speedy and costs down.

One restaurant chain, Atlanta-based Arby's, Inc., and some of its franchisees around the country are testing a customer order entry system called the Touch 2000 that lets fast food patrons enter their own orders using touch-sensitive computer screens.

Lori Ellis, vice president of financial

Arby's research found high customer acceptance of the Touch 2000 system, which requires patrons to use computers with touch-sensitive screens to enter their orders.

support and technology, Arby's Inc. says that the system has performed well in test markets, winning consumer acceptance and increasing store productivity. "We felt this type of system was something that was really necessary to address the labor shortage and the tighter margins," she says.

(The system is being tested at an Arby's in Minneapolis. One QMRR editorial staffer, an inveterate fast food consumer, was sent to investigate. "It's fun, easy to get the hang of, and the lines do seem to move quickly," he says.)

Instead of seeing a line of several cash registers as they enter the restaurant, customers now see a colorful row of glowing VDTs waiting at the counter to "take" their order. Patrons who are unwilling or unable to use the system can give their orders verbally to the cashier.

After touching the entry screen, customers see a main menu of food categories (sandwiches, salads, drinks, desserts). They then touch the box to "open" that section and make their choice from the items, which are displayed with their price. A running tab of the customer's order is kept on the screen.

For cashiers, the system requires about a half-day of training, Ellis says. "The biggest issue with employees is to get them responsive to customers. They're supposed to greet the customers and make sure the customer has started ordering and then go run the food. The personal contact with the customer is very important. If it's not there, the customer feels neglected and you're going to lose them."

With the Touch 2000, each cashier is responsible for filling two orders instead of one. By shifting the order-placing duties to the customer, the system frees the cashier to fill the order while the customer makes his or her final food selections.

"When you're doing your own ordering and someone is running the food, it seems like it's all going much faster. In reality, one cashier is filling two orders, so for Arby's we're getting two people through in about the same amount of time. It may be a little longer than if you were one on one, but if the customers think it's faster and we're getting more people through, it makes the lines shorter and it really does improve service," Ellis says.

The system was developed by Management Information Support, Inc. (MIS), a Denver-based firm affiliated with an Arby's franchisee, the Bailey Co. Ray Mueller, president of MIS says that several years ago the Bailey Co. wanted to replace its aging point of sale system and after reviewing the proposals of various manufacturers, it was unable to find one that addressed the issues of speed of service and accuracy.

"We thought long and hard and came up with the idea that we could use a concept similar to the automated teller machine, which gives quick personalized service. Although not done by a human directly, the transactions are fast and very accurate. So we built on that idea to create our own customer order entry system," Mueller says.

Several studies

Arby's, its franchisees and MIS have conducted several research studies to monitor customer acceptance and opinions of the system. The studies are typically done in-store. Customers are asked to rate the system on its ease of use, give their perceptions of service time and indicate if the presence of the Touch 2000 would influence their decision to visit that restaurant again.

Early studies were performed by Atlanta-based Marketing Spectrum, Inc., which helped Arby's focus the research on the right areas, Mueller says. "After the first study, Marketing Spectrum told Arby's that perhaps the survey wasn't asking the right questions. Arby's was focusing on speed of service and they suggested that customer perception and acceptance were the most important things."

Acceptance high

Research has shown that customer acceptance of the system is high. A majority (between 70-80%) of the customers surveyed said they preferred using the machine to having a cashier take their order. Customers also perceive service to be faster with the system. The number of customers who refuse to use the system hovers around 3 to 4 percent.

In creating the system's software MIS used input from fast food customers to learn what issues were important in the quick dining experience. Not surprisingly, one of the biggest concerns was time spent waiting in line, Mueller says.

"If there is a long line, or if the line isn't moving, that is a big negative for customers. They said, 'Even if it's taking a little longer, if I feel like I'm making progress and somebody is doing something to take care of my order, then it's not as bad.' We really focused in on that in developing the system by overlapping the ordering process and the filling process. We also add more (ordering) lines so that each line is shorter and more orders can be put in concurrently, because typically the kitchen can outpace what the front counter can take in.

"While the customer is entering their order, the cashier can start filling it and that overlap in time helps increase speed of service. You can actually take longer to order in a customer order entry environment but because the cashier is doing something at the same time, you can have an overall faster experience. And since

continued on p. 24

Hitting the target: Effective techniques for market share and response rate modeling using demographics

by Charles Schwartz

Charles Schwartz is principal of Demometrika Analytic Services, Los Angeles.

Demographic target marketing has come of age. Market researchers have produced enough response rate studies, demographic market share investigations, and penetration analyses to have motivated even a television documentary on the subject.[1] One thing all these studies have in common is that they use demographic measures to predict a response that is expressed as a proportion (responses as a proportion of mailings, sales as a proportion of the market), and apply those results to geographic areas like ZIP codes or census tracts. Despite violating a host of the technique's assumptions, they often use regression analysis to reach their conclusions.

Regression analysis is a robust technique. Even when its assumptions are violated it can produce useful descriptive results. Target marketing studies are a case in point. Even the most straightforward regression-based target market model can lead to increased sales even though it may be useless for statistical inference. Still, regression analysis makes certain assumptions about reality. The closer the reality being modeled corresponds to those assumptions, the more powerful the results of the model and the stronger its predictive ability. By looking at how target market models relate to the assumptions of regression, it is easy to come up with some simple techniques to enhance the results we can get from our analyses. This article will look at some issues relating to dependent variables. A future article will look at independent variables.

The dependent variable

Typically, target market models use a proportion as the dependent variable. Response rates by ZIP code are proportions. Market penetration by census tract and market share by ADI are both proportions. This is not strictly kosher from the standpoint of regression analysis for two reasons. First, regression imposes a linear and unbounded model on the data. Second, regression requires that the variance of the dependent variable be unrelated to its value.

Linearity and unboundedness

Linearity is simply the assumption that a difference in the dependent variable is constantly proportional to a difference in the independent variable. Unboundedness signifies only that a prediction from the model can have any value regardless of the nature of the variable to be predicted. These assumptions mean that if your model shows that a $5,000 difference in median income corresponds to a 10% difference in market share, the relationship will hold at all levels of market share and all levels of income. If predicted market share is 40% in an area with a median income of $25,000, it will be 50% in an area with a median income of $30,000, 90% in an area with a median income of $50,000 and 140% in an area with a median income of $75,000.

The most apparent problem with these models is that their predictions have no bounds—they can assume meaningless values like 140% or -10%. One obvious solution is to code all predictions above 100% as 100 and all below zero percent as zero. Unfortunately, doing this will bias the predictions even though the model they come from may not itself be biased. This may be more clear if you think of market share as a probability—the probability that a resident of a market area will become a customer. A prediction of 100% implies that you are absolutely certain that the person will buy your product if the product is offered. How certain are you really? Common sense says that you should be more certain of a sale when the prediction is 140% than when the prediction is only 100%. Statistics reflect

READER SERVICE CARD 6/91

FREE INFORMATION ON PRODUCTS AND SERVICES IN THIS ISSUE.

Send me more information on the items circled

500	501	502	503	504	505	506	507	508	509	510	511	512	513	514
515	516	517	518	519	520	521	522	523	524	525	526	527	528	529
530	531	532	533	534	535	536	537	538	539	540	541	542	543	544
545	546	547	548	549	550	551	552	553	554	555	556	557	558	559
560	561	562	563	564	565	566	567	568	569	570	571	572	573	574
575	576	577	578	579	580	581	582	583	584	585	588	587	588	589

Name ______________________ Title ______________________

Please Print

Company ______________________

Address ______________________

City ______________________ State __________ Zip __________

Tel. No. ______________________

PLACE
STAMP
HERE

Quirk's
MARKETING RESEARCH
Review

P.O. Box 23536
Minneapolis, Minnesota 55423

"How do I turn 10 cardiologists with heart transplant patients into a focus group?"

Here are eight reasons to conduct focus groups by teleconference.

1. It's a great opportunity for exotic recruiting—people you could never bring to one place. From dentists with dentures; Japanese who drive American cars; brain surgeons with contact lenses; to Rolls Royce owners who change their own oil.

2. And there's also sensitive recruiting—groups who are unable or prefer not to meet face-to-face. From WWI veterans; substance abusers; overdrawn accountants; vegetarian butchers; to affluent couples with pending divorces.

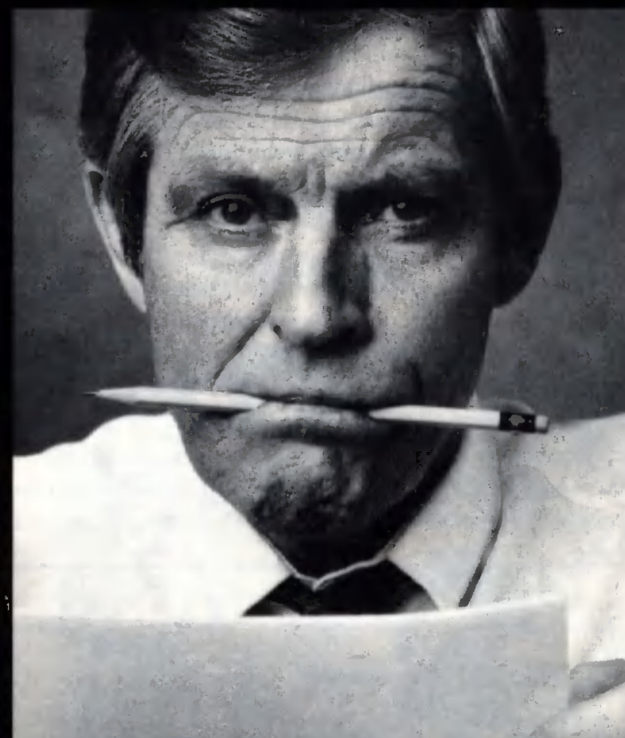
3. Your respondents are more comfortable, more candid and much less likely to be influenced by others' responses.

4. If you need geographical representation, you can easily conduct focus groups across the country or internationally by phone. And you can assemble people from several cities together in the same group.

5. Your moderator, client and respondents don't have to travel—even be in the same city or leave their homes or offices.

6. Your moderator and your client can have private side-conferences anytime during the meeting without the respondents even noticing.

7. You can pause at any point and record an electronic poll on any question without slowing down the meeting.



8. And finally, saving time and money compared to face-to-face is a given—translating into more sessions for the same budget.

If this all sounds great but you are uncomfortable with the phone idea, we'll provide your moderator with some simple pointers and phone techniques—even practice time. Then we'll set up the whole meeting and stand by so everything goes perfectly. We're not market researchers, but we've helped a lot of our clients who are.

Call for information or to reserve a meeting, 1-800-DAROME-1.

DAROME Teleconferencing

Helping produce great meetings.

common sense. You can calculate statistical confidence intervals for the predictions which, in the first case, would show very little chance that actual market share would be under 100%, while in the second, a very strong chance that market share would be less than 100%. By coding both areas the same, 100%, you are implying that the chances for a certain sale in the two areas are equal. Not only that, by doing so you will be introducing error correlated with the actual values that would be predicted on the basis of the independent variables in the model. If the prediction is 140% you add 40 percentage points to the statistical error by coding the prediction as 100%, if it is 150% you add 50 and so on. This is the very definition of statistical bias.

There are ways to surmount these biases. Non-linear mathematical programming techniques for linear probability models subject to inequality constraints are the most direct, but recommended only for the most adept practitioner. Even if you brave their complexity, these techniques do not overcome another kind of bias. It is inherent in selecting and using geographic areas as the subject of your modeling. This bias is known as selection bias and can effect any non-random sample. It is particularly damaging to a linear probability model. Again consider areas where your model will predict market shares over 100%. Some of these areas will have very good demographics and lead to predictions near 100%. Some will have demographics to kill for and lead to predictions well over the 100% mark. What is certain is that all of the areas will have actual market shares under 100%. Furthermore, given the quality of their demographics, the areas will be bunched closely together in the upper end of the market share distribution. This is no problem if two conditions are met: First, customers have the same access to the product in all areas of the market or, at the least, access is not related to demographics. Second, your study covers all current and potential markets or a representative sample of them. If your current distribution system was planned with demographics in mind or if you plan to use the study to evaluate new markets, one or both of these assumptions will be violated.

What happens when the assumptions are violated? The consequences are glaringly obvious for market areas where market share is over 95%. No matter how different the demographics between two areas in this group, they can differ in market share by only five percentage points. On the other hand, two areas with poorer overall demographics but with the same relative demographic difference between them can differ in market share by a far higher margin. In the previous median income example we saw that an area with an income of $55,000 would have a market share of 95%; if income were $25,000 higher, actual market share could increase at most five percentage points. On the other hand, if median income in the first area were $10,000 and the corresponding market share were 20%, a $25,000 increase in income would lead to a market share of 70%, a 50 percentage point increase. In essence, the effects of the independent variables become compressed as you reach the extremes of zero and 100% simply because they bump up against an arbitrary floor or ceiling imposed by the data. The result is that areas at the extremes of the range will have high variability in the demographic variables, but very little variability in market share.

What happens if your study does not cover areas with the very, very best demographics? Your study will be biased. Both market share and average demographics will be lower in your sample of areas than in the universe of areas. But the bias will be differential—the omitted areas could easily be much more extreme on demographics than on market share simply because of the compression effect described in the last paragraph. This will lower the apparent market share of the high market share areas taken as a group, but it will change the group's apparent demographics much more seriously. The result is a biased slope—the model will estimate too high or too low depending on the demographics of the market areas that are left out—regardless of what method you use to deal with predictions above 100% or below 0%.

You should note that this is a particular difficulty for linear probability models (no matter how they are estimated) as compared to other regression models. If market share had no ceiling, the omitted areas might have market shares of 140% or 200% instead of being limited to a 100% maximum. Both market share and demographics would have the same degree of downward bias if these areas were omitted. While this would bias their absolute levels, it would preserve the relationship between the variables. In this case, unlike our previous example, a $10,000 increase in income would lead to a ten point increase in the actual value of the dependent variable in any and all areas—and that is what your regression would show regardless of which areas were omitted. There may be substantive reasons that would make this untrue and bias your results, but they would not be biased for simple arithmetic reasons as they would be if your dependent variable had a 100% ceiling.

All this is not to say that substantive issues do not play a role in biasing probability models. They do—and generally in a way that will intensify the effects of selection bias. This is related to problems in cracking new markets and saturating old ones. Often the hardest market share points to gain are the five from zero to five percent and the five from 95 to 100 percent. In the first case you are entering a new market, you have little visibility and no word of mouth. There might be a threshold level of demographics you need to succeed. Other things being equal, you will need more "push" from your independent variables to go from nothing to five percent in a new or below threshold market than you will need to go from 20 percent to 25 percent in a market where you are well established and have proven drawing power for the population. Likewise at 95%, to be extreme, your market is saturated. Regardless of favorability, you may not be able to get that last five percent. Demographics or anything else will make little difference. Note that this substantive bias goes in the same direction as the selection bias—both cause the "distance" between extremely high or extremely low percentages to appear much greater than the distance between moderate percentages like 25 and 30 percent. This is well known in the statistical literature which suggests that things will be essentially linear between 25 percent and 75 percent, distances will be equal in other words, but that beyond those levels bias will cause distances to stretch more and more, until as they approach 100 percent or zero they appear infinite.

The same kind of problems appear in the analysis of contingency tables when looking at such factors as product preference. The solution there is the well known logistic model. That model treats a probability as an odds ratio—the probability of someone choosing Brand A divided by the probability of choosing any of the competing brands. It then takes the logarithm of that ratio.[2] With some algebra you would be able to see that this is a direct transformation of the market share or preference value itself—a transformation with just the qualities we want. It makes distances between percentages linear at moderate levels but stretches out the distance between percentages as they become more and more extreme. In effect it takes care of both the substantive and arithmetic biases of the linear probability model by reflecting the true nature of the response of a probability, such as market share, to independent predictive variables. By reflecting the nature of the dependent variable, models will predict better, especially with a less than ideal sample.

There is little in the literature about the application of logistic models to geodemographic market share data. I have found, however, that a simple adaptation of the grouped logistic model can be used and usually results in more robust, more predictive demographic models. The procedure is simple. I will use market penetration to illustrate. For each area, such as a ZIP code, obtain information on the population that is able or likely to purchase the product and the number of actual customers. Rather than computing the penetration, compute the logit with suitable corrections. That is:

$$\text{Logit} = \ln\left[(\text{Customers} + .5) / (\text{Population} - \text{Customers} + .5)\right].$$

Then, using proper weights (to be discussed in the next section), do a linear regression using the logit. To obtain a stable model, leave out areas with no customers or even just one or two. In those areas, the logit will be a function only of population.

Since differences between logits are not very intuitive, you should assess the relative importance of the independent variables in your model by comparing their standardized regression coefficients rather than by looking at the raw coefficients.

Standardized coefficients express the relationship between two variables in standard deviation units—that is, the expected change in standard deviations of the dependent variable per standard deviation of the independent variable. They can be compared to one another with the same kind of interpretation you would use with partial correlations. In fact, if there is only one independent variable, the standardized coefficient will be the correlation between the dependent and independent variables. Most statistical software packages offer the standardized coefficient as an option.

Once you are satisfied with the model, obtain predicted values for the logits and convert them to penetration by the formula:

$$\text{Penetration} = \exp(\text{logit}) / [1 + \exp(\text{logit})].$$

I have found that using these formulas for prediction results in lower root mean square error (RMSE), higher R^2, and less sensitivity to outliers than linear probability models. In particular, linear models appear extremely sensitive to outliers when compared to logistic models. In one notable case, I found a difference in R^2 of .20 when I left out one census tract from a universe of 2,000 in a linear market share model. That tract happened to be a large Marine base whose population was ineligible for the service being offered. There was no similar difference when the model was recalculated using logits.

The improvement over the linear model can be tested. Randomly divide your market into two parts. Produce models using one part and evaluate them by deriving predicted penetration rates for the other. Even when the linear model obtains a higher R^2 in the model population, the logistic model, after being converted to penetration, will typically show an equal or higher R^2 and lower RMSE than the linear probability model in the test group. Another procedure for comparatively evaluating the models is to estimate both the linear and transformed model on the entire sample and use Box and Cox's procedure for evaluating transformations. Recipes for the procedure are in many books but a good one is by Maddala.[3] If you do compute linear and logistic models on your entire sample remember that you cannot compare them directly in terms of R^2 or RMSE. You must use a procedure like Box and Cox.

Variance

A basic assumption of regression analysis goes by the term homoscedasticity. That means only that the random error variance in the variable to be predicted is not correlated with its value. In other words, predictions are equally reliable whether their value is ten or ten thousand—the amount of error will be the same at either level. Violating the assumption will not bias your estimates or make them inconsistent, but it will make them inefficient. Coefficients that should be significant will appear insignificant and confidence intervals for predictions will be wider than they need to be given the data.

Correcting this problem is a simple matter if the variance is known. Use the reciprocal of the known variance to weight the observations in your regression analysis. Most statistical programs have a simple mechanism for doing just this.

But is the variance known? In geodemographic models it almost always is. In elementary statistics, we all learned that given a sufficient sample size the variance of a proportion is pq/n, where p is the proportion, q is 1-p, and n is the sample size on which the proportion is based. In a geodemographic study, each area, such as a ZIP code, is both a single observation and a sample digit in its own right. The market share or penetration variable corresponds to p, and its denominator, population or market size within the geographic unit, is n. To attain more efficient estimates, weight each observation by the reciprocal of this variance or (for a penetration model):

$$1 / [\text{Penetration} * (1 - \text{Penetration}) / \text{Population}]$$

where penetration is coded as a proportion between zero and one and population is the population that is eligible or likely to purchase the product or service. It is a straightforward matter to adapt the equation to market share as well as penetration. The variance of a logit is also well known. For a logistic model weight each observation by:

$$1 / \{[\text{Population} + 1) * (\text{Population} + 2)] / [\text{Population} * (\text{Customers} + 1) * (\text{Population} - \text{Customers} + 1)]\}.$$

These variance formulas represent two obvious substantive truths. First, observations will be more reliable, they will persist over time, if they are based on large populations. A penetration rate based on 5 people will change 20 percentage points if one person becomes a customer, based on 1000 people, it will change one tenth of a percentage point. Second, the more extreme the proportion, the less room it has to vary. We saw this in our discussion of linearity. By using these variance weights, we are implicitly saying that we will pay the most attention to our most reliable observations when we draw conclusions. In practice, I often find may of the smaller ZIP codes or census tracts to be outliers. Including them without weighting can, and often does, lead to high R^2 models that make absolutely no substantive sense and often lead to nonsensical predictions. Weighting will tend to lower your R^2, but in many cases will increase the predictive value of the models you produce.

A final word

Geodemographic market share and penetration models have proven their worth in the marketing research discipline. Compared to other methods, these regression models are cheap, easy to calculate and they get results. The data they use are regularly available and the analysis programs are legion and easy to use. It is in the power of these models that their danger lies. From a statistical standpoint, geodemographics are not straightforward. They tend to be non-linear and demand that the analyst use procedures such as those I have just described. The independent variables themselves present difficulties. They are highly correlated to one another, and often dependent on geographic distances. That too is controllable, but the subject of another article.

It is possible to ignore these issues and still develop usable models if you pay very close attention to the substantive meaning of the results and make extensive use of regression diagnostics to identify outliers and overly influential data points. On the other hand, with proper mathematical transformations and weighting you will reduce the number of outliers and the influence of the odd ZIP code or census tract. It will be easier to diagnose your models and you will ultimately produce simpler models than you could with linear regression. More important, you will use more of the information your data offer. By making your models fit the reality of the data more closely, your predictions will be more accurate, more efficient and, most important, more valuable to those who use them. ❑

1. A fascinating survey of the power of demographics produced for PBS' Nova series.
2. That is, ln[P / (1 - P)]. Many books cover this model. See, for example, Pindyck, E.S. and D.L. Rubinfeld, **Econometric Models and Forecasts**. New York: McGraw Hill, 1976.
3. Maddala, G.S. **Econometrics**. New York: McGraw Hill, 1977. Pp. 315-317.

Study finds slowdown in purchase of electronic items

A recent survey on household electronics by the Barna Research Group, Glendale, CA, found that the growth of home technology has slowed to a crawl. Ownership of equipment such as VCRs and personal computers has changed little over the past 18 months. While VCR ownership has risen to more than three-quarters of all households (78%), this is a minimal increase above the 76% penetration figure recorded in late 1989. VCR ownership had been increasing by 20-30% per year until 1989, when ownership reached the 76% level.

Sales of personal computers reflect a similar slowing trend. While the 1989 study revealed that 24% of all households owned a home computer, that figure has risen only slightly, to just 26% today. Recent breakthroughs in technology and even the downward movement of prices appear to have done little to move people into the home computer market.

The most rapid growth over the past two years was seen in ownership of compact disc players. The survey shows that ownership rose from 24% of all households in 1989 to 30% today. Even this rate of growth, while eclipsing that of PCs and home computers. is far below the expectations of industry experts. The huge growth of compact disc sales has created the appearance of greater penetration than is the case. Many CD owners are simply replacing their vinyl album collections with CDs, thus making the CD market appear to be growing much more rapidly than it is.

Ownership of other electronic equipment—cellular telephones, satellite dishes for television reception, and home fax machines—all remain minimal. Less than one out of ten households owns any of those items.

In commenting on these findings, George Barna, president of Barna Research Group, says that technology for home use has reached a critical point in its development. "The early adopters have all rushed out and purchased the latest and greatest innovation. Most adults, who have access to these machines on the job, have yet to determine how their personal lives will be enhanced by owning such technology. If the manufacturers of these pieces of equipment are seeking broader penetration over the next few years, the key will be developing and promoting new and attractive applications. The next few years will be a time when people are less dazzled by the existence of technology and more concerned about the utility and life-enhancement properties of those technologies."

Barna also notes that the highest penetration levels for household electronic equipment were recorded among homes in which there were at least two income-earners; homes in which the adults were under age 55; and urban and suburban locations. Adults from households earning over $60,000 per year were four times as likely as the typical household to own a cellular car phone; three times as likely to own a fax machine; and twice as likely to own a home computer.

The depressed economy has also pushed people to reconsider the necessity of some of these items. According to Barna, the studies indicate that many people are redefining the difference between a necessity and a luxury. "When PCs and CD players first emerged, many adults looked upon those items as something they had to have. Today, though, with tighter money, rising unemployment and other lifestyle pressures playing a larger role in people's lives, fewer individuals regard these technologies as a 'must-have.' Leisure is extremely important to people, as is the protection of their time. Yet these machines are not always viewed as necessary means to enhancing their leisure time or their overall satisfaction with life."

Many firms creating new names

Two out of every three companies created a new name during the last two years, according to an annual survey of marketing executives at 600 U.S. firms. Many methods were used to generate these new names for products, services, or the businesses themselves. But only one-third of companies tests new names before unveiling them.

The survey was conducted by Rivkin & Associates, a communications consulting firm based in Midland Park, NJ. Among the findings:

• 69% of the companies surveyed introduced a new name during the past two years (compared with 55% in the 1990 survey).

• Internal task forces, the most commonly used method, were considered most effective by half the respondents.

• Ranked below that in effectiveness were advertising agencies, naming consultants, employee contests, the extensions of existing names, and other methods such as public relations firms and computer naming software.

• The typical company used several different methods to develop new names.

• Only 37% of companies use research to test new names.

• Name generation projects are viewed

continued on p. 40

NAMES OF NOTE

Joel Dorfman has been promoted to senior vice president at *Audits & Surveys, Inc.*, New York.

Miles K. Hoffman has joined *Gander Mountain, Inc.*, a Wilmot, Wisconsin-based outdoor supplier, as market research manager. He was previously with Heath Company.

Tandem Research Associates, Mahwah, NJ, has increased its staff. **Ellen McGuire** has joined the firm as director, audit research. **Ilene Duchin** and **Jacquelyn Ilacqua** have joined as project directors. And **Beth Steele-Dexter** has been promoted to director, survey research.

Aragon Consulting Group (ACG), St. Louis, has made the following staff additions: **Debora Mudd** and **Nancy Zafft** as project coordinators, and **Kirk Hinson** as a research analyst.

Dale Ibis has been named product research manager of *Trans Union*, a Chicago-based credit information company.

Ihis Burch

Candace Burch has been appointed vice president, Human Resources, for Toledo-based *NFO Research, Inc.*

Siculan

Daniel L. Siculan has been elected vice president of *Wachovia Bank and Trust* in Winston-Salem, N.C. Siculan is manager of First Wachovia market research in the First Wachovia Marketing Group.

Cincinnati-based **MarketVision Research, Inc.** and **AREA Research, Inc.** have formed a new service division of MarketVision called Location Analysts. The primary focus of the division's services will be to real estate development, retail and asset management industries. Rohan S. Andrew will head the division. For more information contact Donald McMullen at 513-791-3100.

The New York-based firms **McCabe and Company** and **Oxtoby-Smith, Inc.** have formed a strategic alliance. Oxtoby-Smith will serve as the research department for McCabe & Company, assuming all of the functions ordinarily handled by an internal agency group.

Jager Companies, an Alabama holding company, has acquired the assets of **Graham & Ascts. Market Research, Inc.,** headquartered in Birmingham, AL. The company will operate under the name of **Polly Graham and Ascts.** The officers are Cindy Eanes, operations; Jim Jager, administration; and Arnold Mooney, development. Polly Graham founded the company in 1964 and has been retained as a consultant. Her son Charles Graham has also been retained as a consultant.

Wheeling, IL-based **U.S. Research** has added the focus group moderating capabilities of Chicago's **Top Box, Inc.** to its services. Top Box, a marketing, business analysis and market research firm, was founded in 1986 by Larry Clark, who was previously group manager, new products, for Kraft, Inc.

Marilynn Whaley has opened **Whaley Research & Ascts., Inc.**, 5001 Riverdale Court, College Park, GA, 30337. Phone 404-991-2588. Fax 404-991-4904.

P.G. Thomsen & Ascts., a new market development consulting firm located in Frankfort, IL, a suburb of Chicago, has been formed by Philip Thomsen and Donald Lorenz. The company's services include assisting clients in locating offices and/or manufacturing facilities, locating manufacturers' reps and/or distributors and conducting marketing research. For more information, contact Donald Lorenz at 815-469-7122.

Nichols Research has opened a new focus group facility with two focus suites, client's lounges, and test kitchen at 333 W. El Camino Real, Suite 180, Sunnyvale, CA. For more information contact Marjorie O'Brien at 408-773-8200.

System processes verbatims

DJCode is a computer assisted verbatim processing service for coding, manipulating, and accessing open-end responses. Using software developed by Doris J. Cooper & Associates, Irvington, NY, DJCode is especially suited for copy/concept testing, and quality assurance studies. It features: 100% presentation of exact verbiage grouped by codepoint; the capability to redefine, expand or collapse codepoints and flag responses based on opinions expressed by a respondent in other parts of the survey; isolation of verbiage by specific target groups (age, sex, location, etc.); location of specific testimonial quotes/verbiage. For more information, contact Doris Cooper at 914-591-4731.

Device offers alternative to paper questiouuaires

A new device called the GRIDPAD, a flat 8x10 inch black box with a pen-like, touch-sensitive wand, allows research participants to enter their opinions directly into a microcomputer. Participants harness the GRIDPAD around their shoulders and move about freely, as if holding a clipboard. Questions are displayed on the screen with multiple choice answers, which are selected by touching the appropriate box with the wand. The device was developed by the Fremont, CA-based Grid Company. The software package that interfaces with the device to generate questionnaires was developed by Advanced Data Research (ADR), Rochester Hills, MI. For more information, contact Dave Pietrowski, ADR, 313-375-5470.

Crime data availahle

National Planning Data Corporation (NPDC), Ithaca, NY, has signed a licensing agreement with CAP (Crimes Against Persons and Property) Index, Inc. NPDC is now an authorized distributor of CAPCrime crime risk assessment information. CAPCrime information is designed for use in market analysis and planning, property acquisition, security and insurance program development, and litigation support. NPDC's CAPCrime reports provide information for decision makers in the above fields to: assess a site's present vulnerability to crime, compare vulnerability among several sites, and predict future risks and trends. CAPCrime is a statistical model that incorporates hundreds of data points, providing current year estimates and five-year projections of the likelihood or risk of the occurrence of various crimes against persons (homicide, rape, robbery, aggravated assault) and property (burglary larceny, motor vehicle theft). For more information, contact NPDC at 607-273-8208.

Business information on CD

American Business Information (ABI) has recently introduced a database of U.S. businesses, "Lists-On-Discs," a CD-ROM based desktop marketing system that lets companies retrieve information on 9.2 million firms with their own PCs. For more information, contact ABI at 402-593-4565.

Report profiles purchasers of fresh flowers and plants

A new report titled "Shopping for Fresh Flowers/Plant Products" is now available from the Produce Division of Vance Publishing Corporation. The report presents reasons consumers say they purchase floral products from supermarkets and addresses a number of other topics, from the most widely available floral products to awareness of floral advertising. The survey results are based on a sampling of 1,390 U.S. households. For more information contact Carolyn Lary at 913-451-2200.

Firms offer data on huyers of new cars and light trucks

Claritas Corporation and R.L. Polk's Statistical Services Division introduce PRIZM-Polk On-Line, a new product that links Claritas' PRIZM profile information with Polk's new-vehicle registration data. These profiles of new car and light duty truck buyers are available through REGIS, Polk's on-line registration information system. For more information contact Mike Reinemer at Claritas at 703-683-8300.

Arby's

continued from p. 9

you're in control of the ordering process, the orders tend to be more accurate, so we have fewer voids and over-rings," Mueller says.

As changes were made to the system, time studies were performed to determine which screen layouts were the easiest for people as first-time users and also as repeat users.

Regional differences

The ongoing research in the various test markets has uncovered some regional differences in customer preferences. The system can be modified to fit these preferences, Mueller says. "On a chain by chain basis, we've found that some customers interacted differently with the menu, and it didn't occur to us that that might be the case. We thought a sandwich, fry and a drink was a sandwich, fry and a drink, but it doesn't really work that way. So the research helped us to fine tune things."

For example, in some of the restaurants the system first displays a screen of combination-type specials before entering into the main series of menus, to give people who want a combo meal a chance to order quickly and exit the system.

Arby's Inc.'s Lori Ellis says that the average check size has increased in the stores that are using the system, due in part to the system's suggested sell feature. (Suggested selling, in which the cashier asks, for example, "Would you care for any dessert with that?", is a way for the chains to increase profits by capitalizing on impulse purchases of dessert items, etc.) Despite their training, cashiers can overlook the suggested sell, so having the computer do the asking ensures that the question is posed to every customer, Ellis says. "No matter how much you tell your sales people to suggested sell, it just doesn't happen. But this system does it for each customer. Our check average has increased and we feel it's because of that feature."

Smart restaurants

Testing a system like the Touch 2000 is just one step Arby's is taking towards the goal of having "smart" restaurants, Ellis says. "We've always believed that we would at some point have PCs in all of our restaurants. Once you have a PC in the restaurant you really open up a whole new world. You can automate your cooking, your energy systems, you can tie in the credit cards, use scanning devices. With a flexible system you really open up a 'smart' restaurant possibility."

Ray Mueller: "I think automation is going to be a trend because of the (economic and labor shortage) pressures. The cost of running the business is so high, but if you raise your prices too much, people would rather go to a sit-down type of restaurant. So you have to be fast and efficient and reasonably priced."

In addition to using cashiers more efficiently, the system can make the job of the store managers easier by taking over a good share of the nightly paperwork and number crunching, which may assist in reducing manager burnout. "We've been taking it into the stores where they've never touched a computer before and the managers have picked it up. It's a great control system because it's tied to a PC in the back office that runs all the end of the day and end of the month reports, so the manager is no longer cranking out inventory reports and labor scheduling by hand. It can provide data by cashier, looking at how many times they voided an order, etc., all the things that cause cash to walk out the door," Mueller says.

For Arby's, an additional use for a Touch 2000-type system may include simplifying drive-thru ordering, Ellis says. "There is no good solution to the drive-thru. You can never hear them, they can't hear you. You can get the wrong order. Using a system like the (Touch 2000) could be a real benefit. The screen has an electronic journal on it so you can see what you've ordered and know that it's being taken care of right. It could eliminate a lot of the mistakes that can occur."

Wide variety of demographics

The research has also helped M.I.S. demonstrate to other potential buyers of the system that customers with a wide variety of demographics will accept Touch 2000. "Because of the information from the research, we're having better success in showing our customers that this is a viable alternative for them to conventional verbal ordering," Mueller says.

Despite consumer acceptance of the system, Mueller says that prospective buyers still seem to have psychological barriers to a computerized system, even though the nation has become more and more comfortable with using computers.

"We've shown conclusively that (fast food patrons) will accept the system, but it is still somewhat of a problem for the owners and operators of the fast food restaurants to really latch on to this. Typically it's an industry that isn't very automated to begin with and as a result, getting them to take a couple of big steps like this at once is difficult.

"But two presidents of some fairly good sized chains have said to me that within five to ten years every fast food establishment will have a system like this in order to remain competitive. I don't see how they can respond to the continued increase in the cost of labor, the high cost of turnover, labor shortages, and the competitive marketplace. They have to find ways to become more competitive. Touch 2000 or a system like it isn't going to do it by itself. It will have to be a combination of technologies and other methods." ❑

How to use the instant marketing research jargon generator

by Gerard J. Ennis

Editor's note: Gerard Ennis is a project manager in the marketing research department of ICI Pharmaceuticals, Wilmington, DE.

It is occasionally useful to put names on the work we do in order to describe the marketing research tools we use. For some clients, this helps differentiate one study from another, or understand what methodology lies behind the conclusions we draw. Perhaps a certain comfort comes from seeing that the conclusions and recommendations have emerged from something other than rough estimates, dart-board picks and casual conversations with friends.

The tools we have at our disposal as marketing researchers are increasing both in number and complexity. Coming up with names to describe the work becomes more of a challenge. After all, how exciting or impressive is something labeled "report" or "description"?

As our work becomes more sophisticated and more professional so also must the names we use to describe the research. Fortunately, the marketing research profession is developing its own jargon. Indeed, recent advances in marketing research have created new jargon that is nearly as incomprehensible as it is sophisticated. The availability of some of these newer terms has opened up a whole new world of descriptive names for marketing research work.

Instant Marketing Research Jargon Generator Table

	1	2	3
0.	quantitative	positioning	review
1.	qualitative	behavior	analysis
2.	definitive	promotional	evaluation
3.	multivariate	consumer	projection
4.	syndicated	product	measurement
5.	proprietary	cluster	research
6.	national	regression	data
7.	integrated	perceptual	methodology
8.	discriminant	concept	mapping
9.	preliminary	segmentation	scaling
	univariate	psychographic	testing
	conjoint	demographic	audit
	primary	market	study
	secondary	factor	project

However, as the saying goes, "there's always room for more," especially when we want the clients to be particularly impressed by the research (whether it deserves it or not).

In that light, we present to you the "Instant Marketing Research Jargon Generator." With this handy tool, you can generate an almost endless variety of impressive, intelligent-sounding technical names to describe your research.

The tool is simple to use. Just make up any three-digit number, from 000 to 999. Then look at the words in the columns in the generator table to create your own technical jargon. For instance, the number 764 creates the term "integrated regression measurement." And the number "093" turns out to be the "quantitative segmentation projection." If you don't like the results you get with any given number, there are a few spare words on the bottom of each column which you can use for variety and further enhancement.

In any event, you now have the "Instant Marketing Research Jargon Generator"—a tool bound to bring instant respect for your work. ❑

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.

Access Research, Inc.
8 Griffin Rd. No.
Windsor, CT 06095
203/688-8821
Contact: Robert C. Platkin
Group Health/Pens. P/C, Alc. Bev/Food, 15 min Airpt.

ADI Research, Inc.
(See Matrixx Marketing)

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

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

Analytics, Inc.
999 N. Elmhurst Rd., Stes. 15 /16
Mt. Prospect, IL 60056
708/870-1973
Contact: Larry Kaufman
Since 1972, moderated and analyzed over 2,000 groups

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

The Atlantis Group
342 Fourth St.
Atlanta, GA 30308
404/577-8000
Contact: Charles Bazemore
The difference is in the moderating and the reports

Bartels Research, Corp.
145 Shaw Ave., Ste. C-1
Clovis, CA 93612
Contact: Laura Wasserman
Qual/Quant. Rsch. , F/G Rctg. Mod. facil. 25 yrs. exper.

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

Chamberlain Research Consultants
12 East Olin Ave.
Madison, WI 53713
608/258-3666
Contact: Sharon Chamberlain
Full-service marketing research. Business & consumer studies

Clarion Marketing and Comm.
340 Pemberwick Road
Greenwich, CT 06831
203 / 531-3600
Contact: Thomas L. Greenbaum
Clarion Offers Unique Approach To Groups; Call to Find Out Why

Saul Cohen & Associates, LTD.
Suite 102, 30 Eliot Lane
Stamford, CT 06903
203/322-0083
Contact: Saul Cohen
Specializing in All Qualitative Methodologies

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

Creative Marketing Solutions, Inc.
P.O. Box 487
Lahaska, PA 18931
215/357-3655
Contact: Larry Schwarz
Experienced Specialists in Qualitative Research Techniques

Creative Research Associates,Inc.
500 N. Michigan Ave.
Chicago, IL 60611
312/ 828-9200
Contact: Stephen Turner
Twenty-Five Years of Leadership in Qualitative Research

Cunninghis Associates
43 Middleton Lane
Willingboro, NJ 08046
609/877-5971
Contact: Burt Cunninghis
37 Years Exp., Moderator & Moderator Training

Decision Research
99 Hayden Ave.
Lexington, MA 02173
617/861-7350
Contact: Peg Marrkand
Over 25 Mods. Avail., Bus/Cons Grps., Offcs: NY,LA,SF,Atlanta

DeNicola Research, Inc.
Two Landmark Square
Stamford, CT 06901
203/967-3595
Contact: Nino DeNicola
Consumer,Healthcare,Financial Services, Advertising

Direct Marketing Research Assoc.
4151 Middlefield Rd., Suite 200
Palo Alto, CA 94302
415/856-9988
Contact: Michael Green
Catalog, Direct Mail, Bus-to-Bus, Space, Databases

Doane Marketing Research
1807 Park 270 Drive, #300
St. Louis, MO 63146
314/878-7707
Contact:David Tugend
Agriculture, Veterinarian Products

Dolobowsky Qual. Svcs., Inc.
94 Lincoln St.
Waltham MA 02154
617/647-0872
Contact: Reva Dolobowsky
Experts In Ideation & focus groups. Formerly with Synectics.

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

D/R/S HealthCare Consultants
3127 Eastway Dr., Ste. 105
Charlotte, NC 28205
704/532-5856
Contact: Dr. Murray Simon
Specialists in Research with Providers & Patients

Equifax / Quick Test Opinion Ctrs.
5430 Van Nuys Blvd., #102
Van Nuys, CA 91401
213 / 872-1717
Contact: Louise Kroot-Haukka
Consumer/Pkg Goods/Advertising Heavy Experience in Fast Food

First Market Research Corp.
2301 Hancock Drive
Austin, TX 78756
800 / FIRST-TX (347-7889)
Contact: James R. Heiman
High Tech,Publishing, Bus-To-Bus, Colleges

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

Focus America
1140 Ave. of the Americas, 9th Fl
New York, NY 10036
212/302-1808
Contact: David Schreier
Mid-Manhattan Loc/ State of the Art Fac. / 15 Seat Viewing Room

Focus Plus
79 5th Avenue
New York, NY 10003
212/807-9393
Contact: Elizabeth Lobrano
Impeccable Cons. & B-B Recruiting/Beautiful Facilities

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

Gilmore Research Group
2324 Eastlake Ave. E., Ste. 300
Seattle, WA 98102
206/726-5555
Contact: Michelle Zerbetz
Exp. Prof. Moderators to Meet Your Needs.

Greenfield Consulting Group,Inc.
274 Riverside Ave.
Westport, CT 06880
203/221-0411
Contact: Andrew Greenfield
Qual./Ouan. Rsch, New Product Dev., Finc Svcs,Toys/Games

Grieco Research Group, Inc.
743 North Avenue 66
Los Angeles, CA 90042
213/ 254-1990
Contact: Joe Greico
Marketing and Advertising Focus Groups

Hammer Marketing Resources
179 Inverness Rd.
Severna Park (Balt/Wash), MD 21146
301/544-9191
Contact: Bill Hammer
23 Years Experience - Consumer, Business & Executive

Hispanic Marketing Communication Research
1535 Winding Way
Belmont, CA 94002
415/595-5028
Contact: Dr. Felipe Korzenny
Hisp. Biling./Bicult.Foc Grps Anywhere In U.S./Quan. Strat. Cons .

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

Hughes Marketing Communications
341 Farnum Road
Media, PA 19063-1605
215/ 566-6542
Contact: Warren B. Hughes
Moderate Focus Groups; In Depth Interviewing.

JRH Marketing Services, Inc.
29-27 41st Avenue
New York, NY 11101
718/786-9640
Contact: J. Robert Harris, II
Experience Counts: Check out the rest but USE THE BEST

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

KS & R Consumer Testing Center
Shoppingtown Mall
Syracuse, NY 13214
800/ 289-8028
Contact: Lynne Van Dyke
Qualitative /Quantitative, Intercepts, CATI, One-on-One

The Looking Glass Group
401 Henley St., Suite 10
Knoxville, TN 37902
615/525-4789
Contact: Dick Nye
Groups, In-Depths, etc. Heavy Ad/Mktg./Publ. Experience

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

Manhattan Opinion Center
369 Lexington Ave.
New York, NY 10017
212 / 972-5553
Contact: Jana Warren
3 Room Focus Group Facility/ Quality Recruiting

Marketeam Associates
1807 Park 270 Drive,#300
St. Louis, MO 63146
314/ 878-7667
Contact: Richard Homans
Financial Services, HealthCare, Consumer, Pkgd. Goods, Agric.

Market Facts, Inc.
676 North St. Clair
Chicago, IL 60611
312/280-9100
Contact: Linda Leemaster
20+ yrs. in consumer, industrial, medical, business

Market Navigation, Inc.
Teleconference Network Div.
2 Prel Plaza
Orangeburg, NY 10962
914 / 365-0123
Contact: George Silverman
Med, Bus-to-Bus, Hi-Tech, Indust, Ideation, New Prod., Tel. Groups

Matrixx Marketing-Rsch Div.
Cincinnati, OH
800/323-8369
Contact: Michael L. Dean, Ph.D.
Cincinnati's Most Modern and Convenient Facilities

Medical Marketing Research, Inc.
6608 Graymont Place
Raleigh, NC 27615
919/870-6550
Contact: George Matijow
Specialists in Health Care Research; MDs, RNs, Pts.

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

Doreen Mole Qualitative Research, Inc.
RR1, Box 1069, Millstone Rd.
Sag Harbor, NY 11963
516/725-2160
Contact: Doreen Mole
Custom design. Strong advertising marketing background

Ruth Nelson Research Svcs.
2149 S. Grape Street
Denver, CO 80222
303/758-6424
Contact: Christy Reid
Consumer, Tech/Indust., New Prod., Concept Test/Refinement

PACE, Inc.
28535 Orchard Lake Road
Farmington Hills, MI 48018
313/ 553-4100
Contact: Peter J. Swetish
Full Service Vehicle Specialist-OEM & Aftermarket Experience

Payne & Partners
70 West Madison, Ste. 1400
Chicago, IL 60602
312/443-9666
Contact: Melanie Payne
Superior Marketing & Analytical Skills

PLAYLAB® Research,Division of The Creative Group, Inc.
31800 Northwestern Hwy. # 385
Farmington Hills, MI 48018
313/855-7812
Contact: Dana Blackwell
Children, Teens, Moms, Expect. Moms, Parents, Grandparents & Families

Research, Inc.
521 Plymouth Rd., Ste. 115
Plymouth Meeting, PA 19462
215/941-2700 or
800/828-3228
Contact: Phyllis Santoro
Creative Design and Discussions--Actionable Results

Rhode Island Survey and Research Service, Inc.
690 Warren Avenue
East Providence, RI 02914
401/438-4120
Contact: Patricia Shakel
First in New England. Established in 1962

R J Research
P.O. Box 3787
Santa Rosa, CA 95402
707/ 795-3780
Contact: Bob Pellegrini
Full Service Qual / Quan, Most Packaged Goods & Bus to Bus

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

Rodgers Marketing Research
4575 Edwin Drive, NW
Canton, OH 44718
216/ 492-8880
Contact: Alice Rodgers
Creative / Cost Effective: New Product / Consumer, Etc.

Pamela Rogers Research
311 East 50th Street
New York, NY 10022
212/751-3380
Contact: Pamela Rogers
Environmental Issues-Healthy Food / Products / Packaging

James M. Sears Associates
48 Industrial West
Clifton, NJ 07012
201/ 777-6000
Contact: James M. Sears
Business-To-Business And Executives A Specialty

Snell Associates, Inc.
941 Vernal Avenue
Mill Valley, CA 94941
415/ 388-8315
Contact: Joyce Snell
Consumer/exec/prof focus groups conducted nationally

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

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

Dwight Spencer & Associates
1290 Grandview Avenue
Columbus, OH 43212
614 / 488-3123
Contact: Betty Spencer
4'x16' Mirror Viewing Rm Seats 8-12. In House Audio/Vid. Equip

Jane L. Stegner & Ascts.
2215 Penn Ave. So.
Minneapolis, MN 55405
612/377-2490
Contact: Jane Stegner
Bus-To-Bus/Medical/Fncl Svcs/ Agric., Groups/ 1:1's

Sweeney International, Ltd.
221 Main St.
Danbury, CT 06810
203 / 748-1638
Contact: Timm Sweeney
Qualitative Research. Member: QRCA / AMA / Advt. Club

Telesession Corporation
355 Lexington Ave.
New York, NY 10017
212 / 599-1500
Contact: Michael Gorbein
Focus Groups by Phone / Medical / Agriculture / Business-toBusiness

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

The Travis Company, Inc.
509 Cathedral Parkway, Suite 8E
New York, NY 10025
212/ 222-0882
Contact: Jerry Travis
Qualitative Research and Consultation

TRENDFACTS Research, Div. of The Creative Group, Inc.
31800 Northwestern Hwy.
Farmington Hills, MI 48018
313/855-7810
Contact: Brett Blackwell
Consumers, Retail, Rest., Real Est., Financial, Hlthcare, Indust., Bus-Bus

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

Winston Stuart Ascts., Inc.
2670 Nichols Canyon Rd.
Los Angeles, CA 90046
213/851-4127
Contact: Bill Smolka
New Prod, Adv. Pkg. Goods, Ent. Cons. Execs, Bus.

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

Yarnell, Inc.
1 Anita Drive
East Hanover, NJ 07936
201/593-0050
Contact: Dr. Stephen M. Yarnell
Information Technology/ Financial Services/ Modeling

STATE CROSS INDEX OF MODERATORS

Refer to Preceeding Pages For Address, Phone Number and Contact

SPECIALTY CROSS INDEX OF MODERATORS

Refer to Preceeding Pages Listings For Address, Phone Number and Contact

EXECUTIVES
Chamberlain Rsch. Cnsltnts.
Dolobowsky Qual. Svcs., Inc.
First Market Rsch(J. Heiman)
Kennedy Research Inc.
The Looking Glass Group
Market Views Research, Inc.
PACE, Inc.
Research, Inc.
James Spanier Associates
Sources For Research, Inc.
Sweeney International, Ltd.
TrendFacts
Winston Stuart Ascts., Inc.

FINANCIAL SERVICES
Access Research, Inc.
Dolobowsky Qual. Svcs., Inc.
First Market Rsch(L. Lynch)
Greenfield Consulting Group, Inc.
LaScola Qualitative Research
Marketeam Associates
Matrixx Marketing-Research Div.
PACE, Inc.
Payne & Partners
The Research Center
Rockwood Research Corp.
Southeastern Institute of Rsch
James Spanier Associates
TrendFacts
Winston Stuart Ascts., Inc.
The Winters Group
Yarnell, Inc.

FOOD PRODUCTS
American Public Opinion Survey & Market Research Corp
Analytics, Inc.
Doyle Research Associates
D.S. Fraley & Associates
PlayLab/TrendFacts
Research, Inc.
Pamela Rogers Research
James Spanier Associates
Thorne Creative Research
TrendFacts

HEALTH & BEAUTY PRODUCTS
American Public Opinion Survey & Market Research Corp
The Answer Group
D.S. Fraley & Associates
Greenfield Consulting Group, Inc
Market Facts, Inc.
PlayLab/TrendFacts
Research, Inc.
Pamela Rogers Research
Thorne Creative Research

HEALTH CARE
Access Research, Inc.
Chamberlain Rsch. Cnsltnts.
Creative Marketing Solutions
DeNicola Research, Inc.
Dolobowsky Qual. Svces., Inc.
D/R/S HealthCare Consultants
First Market Rsch(L. Lynch)
Greenfield Consulting Group, Inc.
D.S.Howard Assoc., Inc.
Kennedy Research Inc.
LaScola Qualitative Research
Marketeam Associates
Market Facts, Inc.
Market Navigation, Inc.
Matrixx Marketing-Research Div.
Medical Marketing Research, Inc.
MedProbe Medical Mktg. Rsch Research, Inc.
Southeastern Institute of Rsch
James Spanier Associates
Strategic Marketing Services
TrendFacts
The Winters Group

HISPANIC
Analysis Research Ltd.
Hispanic Marketing Communication Research

IDEA GENERATION
Analysis Research Ltd.
Brand Consulting Group
Decision Research
Dolobowsky Qual. Svcs., Inc.
D.S. Fraley & Associates
Matrixx Marketing-Research Div.
PlayLab/TrendFacts
Research, Inc.
Rhode Island Survey, Inc.
Sweeney International, Ltd.
Thorne Creative Research

INDUSTRIAL
First Market Rsch(J. Heiman)
D.S. Howard Assoc., Inc.
Kennedy Research Inc.
Market Navigation, Inc.
Sweeney International, Ltd.
TrendFacts
Yarnell, Inc.

INSURANCE
TrendFacts/PlayLab

MEDICAL PROFESSION
Creative Marketing Solutions
D/R/S HealthCare Consultants
D.S. Howard Assoc, Inc.
Marketeam Associates
Matrixx Marketing-Research Div.
Medical Marketing Research, Inc.
MedProbe Medical Mktg. Rsch
TrendFacts/ PlayLab

MILITARY
American Public Opinion Survey & Market Research Corp
PlayLab/TrendFacts

MODERATOR TRAINING
Cunninghis Associates

NEW PRODUCT DEVELOPMENT
Analytics, Inc
Brand Consulting Group
Creative Marketing Solutions
Dolobowsky Qual. Svcs., Inc.
D.S. Fraley & Associates
First Market Rsch(J. Heiman)
Greenfield Consulting Group, Inc.
D.S. Howard Assoc., Inc.
Market Facts, Inc.
PlayLab/TrendFacts
The Research Center
Research, Inc.
Rhode Island Survey, Inc.
Southeastern Institute of Rsch.
James Spanier Associates
Strategic Marketing. Svces
Winston Stuart Ascts., Inc.

PACKAGED GOODS
Access Research, Inc.
The Answer Group
Doyle Research Associates
D.S. Fraley & Associates
The Looking Glass Group
Doreen Mole Qual. Rsch., Inc.
PlayLab/TrendFacts
The Research Center
Research, Inc.
Thorne Creative Research
Winston Stuart Ascts., Inc.

PARENTS
Doyle Research Associates
PlayLab/TrendFacts
Research, Inc.

PET PRODUCTS
Rockwood Research Corp.
Research, Inc.
Thorne Creative Research

PHARMACEUTICALS
The Answer Group
Creative Marketing Solutions
D/R/S HealthCare Consultants
D.S. Howard Assoc., Inc.
Market Navigation, Inc.
Medical Marketing Research, Inc.
MedProbe Medical Mktg. Rsch
PlayLab/TrendFacts
James Spanier Associates
The Winters Group

POLITICAL RESEARCH
American Public Opinion Survey & Market Research Corp
Chamberlain Rsch. Cnsltnts.
LaScola Qualitative Research
Doreen Mole Qual. Rsch. Inc.

PUBLISHING
First Market Rsch(J. Heiman)
D.S. Fraley & Associates
The Looking Glass Group
PlayLab/TrendFacts
Research, Inc.
Thorne Creative Research

RESTAURANT/ FAST FOOD
PlayLab/TrendFacts

RETAIL
Brand Consulting Group
First Market Rsch(L. Lynch)
Research, Inc.
TrendFacts/PlayLab

SENIORS
Research, Inc.
Snell Associates, Inc.
TrendFacts

SMALL BUSINESS/ ENTREPRENEURS
Access Research, Inc.
Research, Inc.

SOFT DRINKS, BEER, WINE
American Public Opinion Survey & Market Research Corp
Greenfield Consulting Group, Inc
Grieco Research Group, Inc.
PlayLab/TrendFacts
Thorne Creative Research

TEACHERS
D.S. Fraley & Associates
PlayLab

TELECOMMUNICATIONS
Creative Marketing Solutions
Cunninghis Associates
Decision Research
First Market Rsch(J. Heiman)
D.S. Howard Assoc., Inc.
Kennedy Research Inc.
LaScola Qualitative Research
PlayLab/TrendFacts
Research, Inc.
Southeastern Institute of Rsch.
Yarnell, Inc.

TELECONFERENCING
Rockwood Research Corp.

TELEPHONE FOCUS GROUPS
Market Navigation, Inc.
Medical Marketing Research, Inc.
Research, Inc.
Telesession Corporation
TrendFacts

TEENAGERS
Doyle Research Associates
D.S. Fraley & Associates
Greenfield Consulting Group, Inc
The Looking Glass Group
Matrixx Marketing-Research Div.
PlayLab
Research, Inc.
Rhode Island Survey, Inc.
Thorne Creative Research

TOYS/GAMES
Research, Inc.

TRANSPORTATION SERVICES
Sweeney International, Ltd.

TRAVEL
Research, Inc.
Sweeney International, Ltd.
TrendFacts/Playlab

UTILITIES
Chamberlain Rsch. Cnsltnts.

YOUTH
Doyle Research Associates
D.S. Fraley & Associates
PlayLab

Codes:
S=Syndicated
O=Omnibus

Editors Note: This list was developed by mailing forms to those organizations we have found who offer Omnibus/Syndicated Research Studies in their advertisements, publicity or others published material.

American Sports Data, Inc.
234 N. Central Ave.
Hartsdale, NY 10530
Ph. 914/328-8877
Fax 914/328-1823
Contact: Harvey Lauer
American Sports Analysis(s)
Athletic Footwear Monitor(s)
Sports Awareness Monitor(s)
Sports Media Index(s)

Analysis Research Limited
4655 Ruffner St., Suite 180
San Diego, CA 92111
Ph. 619/268-4800
Fax 619/268-4892
Contact: Arline Lowenthal
CHIPS/Continuous Hispanic Profile Study(o)

Advertising Research Corp.(ARC)
77 Brant Avenue
Clark, NJ 07066
Ph. 908/388-5955
Fax 908/388-5645
Contact: Sherrie Starr
ARC Yellow Pages Ad Size Study(s)
ARC Syndicated Measurement Study of Yellow Pages(s)
ARC/TAG Voice Information Services Study(s)
COMPPARE/Comparison of Media Product Purchase and Reach Evaluation(s)
SIMS/Syndicated Usage Measurement Service

Behavior Research Center, Inc.
1117 N. 3rd St
Phoenix, AZ 85004
Ph. 602/258-4554
Fax 602/252-2729
Contact: Earl de Berge
Business Track Phoenix(s)
Consumer Track(o)
Hispanic Track(s)

Beta Research Corporation
6400 Jericho Turnpike
Syosset, NY 11791
Ph. 516/935-3800
Fax 516/935-4092
Contact: Richard Welch
Advertising Communicative Evaluator-ACE(s)
Beta Editorial Tracking Svce-BETS(s)
Subscriber Advertising Measurement(s)
Omni-Health(o)

Irwin Broh & Associates, Inc.
1011 E. Touhy Avenue
Des Plaines, IL 60018
Ph. 708/297-7515
Fax 708/297-7515
Contact: David Waitz
Electrical Appliances(s)
Hardware(s)
Home Healthcare(s)
Lawn & Patio(s)
Marine Products(s)
Outdoor Power Equipment(s)
Sporting Goods(s)
Travel Industry(s)

Bruskin Associates
Metroplex Corporate Center
100 Metroplex Drive
Edison, NJ 08817
Ph.908/249-1800 or 212/349-0781
Fax 908/572-7980
Contact: David Bender
Omnitel-Weekly 1,000 telephone interviews using a randon digit dialing sample of U.S. households. Interviewing Friday, Saturday & Sunday. Fully tabulated results by Tuesday.(o)
Teen OmniTel-Teenage research at an affordable price.(o)
Black America Omnitel-Monthly telephone omnibus. Nationally representative sample of 500 black adults.(o)
(See Advertisement on Page 31)

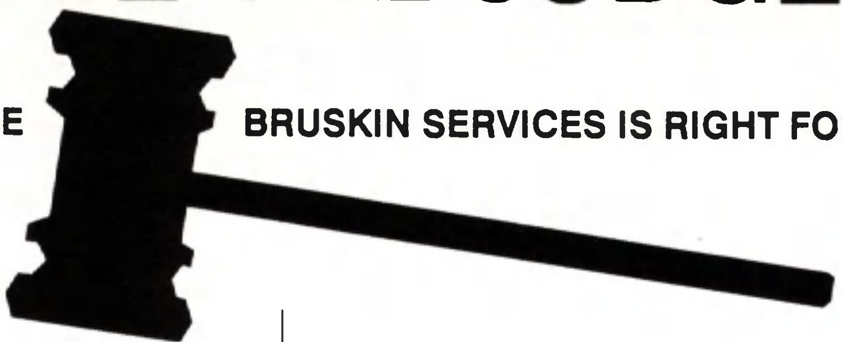
Cambridge Reports, Inc.
955 Massachusetts Avenue
Cambridge, MA 02139
Ph. 617/661-0110
Fax 617/661-3575
Contact: Gene Pokorny
Cambridge Reports Omnibus Surveys(o)
Cambridge Report Program(s)
Quarterly Opinion Review Program(s)
Quarterly Opinion Briefing Program(s)

Canadian Facts, Div. SK/CF Inc.
1075 Bay Street,3rd Floor
Toronto, ONT, M5S 2X5
Ph. 416/924-5751
Fax 416/923-7085
Contact: Donald Monk, Pres.
Monitor(o)
Multifacts(o)

Chemark Consulting
10260 Alliance Rd., #150
Cincinnati, OH 45242
Ph. 513/891-9502
Fax 513/891-2196
Contact: Roger Lohman
Chemical Industry Studies(s)

Children's Market Research,Inc.
1385 York Ave.
New York, NY 10021
Ph. 212/794-0983
Fax 212/879-8495
Contact: Dr. Selina S. Gruber
Kid's Media Watch ™ (s)
Youth Omnibus™ (o)

YOU BE THE JUDGE !



WHICH OF THESE BRUSKIN SERVICES IS RIGHT FOR YOU?

THE CASE FOR CUSTOM RESEARCH

METHOD

Custom designed research studies to meet your needs.

Telephone, In-home and mall intercept interviewing, focus groups, one-on-one interviews, executive interviewing....the data collection technique best suited to your specific needs.

BENEFITS

In-house telephone interviewing (150 CATI lines In five regional Bruskin offices), in-house coding, tabulation and analysis.

State-of-the art interviewing and tabulation enable cost efficient research and quick turnaround.

A research team of professionals headed by an experienced client service executive.

THE CASE FOR OmniTel

METHOD

Telephone Interviewing

FREQUENCY

WEEKLY (every Friday)

SAMPLE

1000 interviews. 1/2 men, 1/2 women, 18 and over. A national random digit dialing(RDD) sample of U.S. households.

SUPPLEMENTS

Teens, children, ethnic groups

BENEFITS

Interviewing Friday-Sunday. Final results delivered by Tuesday morning. Low costs. Demographic breakdowns included.

IN SUMMARY

52,000 telephone interviews each year.

To learn more about Bruekln's weekly omnibus(Omnltel) or about our custom eervlcee, contect ue at:

BRUSKIN
ASSOCIATES
MARKET RESEARCH

A MEMBER OF THE MAI INFORMATION GROUP

BRUSKIN ASSOCIATES
100 METROPLEX DRIVE
EDISON, N.J., 08817
N.J. (908) 572-7300
N.Y. (212) 349-0781
Elsswhere 1-800-834-5773

Circle No. 518 on Reader Card

Codes:
S=Syndicated
O=Omnibus

Com-Sci Systems, Inc.
444 Frontage Rd.
Northfield, IL 60093
Ph. 708/446-0446
Fax 708/446-0504
Contact: Joseph E. Brady
BPI Index(s)
Foodservice Piggyback(o)
Supermarket Bakery Audit(o)
MAPS-Market Area Projections(s)

The Creative Research Group
100 Sheppard Ave. East, #700
Toronto, ONT M2N 6N5
Ph. 416/250-8500
Fax 416/250-8515
Contact: Elisabeth A. Jaye
Green Action Trends(s)
Youth Target(s)
Yankelovich Monitor In Canada(s)

Custom Research, Inc.
10301 Wayzata Blvd
Minneapolis, MN 55426
Ph. 612/542-0800
Fax 612/542-0864
Contact: Kathy Fredell
Criterion Omnibus(o)

Danis Research
One Gothic Plz/Rt 46W & Hollywood Ave.
Fairfield, NJ 07006-2402
Ph. 201/575-3509
Fax 201/575-5366
Contact: Carl S. Raphael
Fresh Track(s)

Dittman Research Corp. of Alaska
DRC Building
8115 Jewel Lake Road
Anchorage, AK 99502
Ph. 907/243-3345
Fax 907/243-7172
Contact: David L. Dittman
Multi-Quest(o)

Doane Marketing Research, Inc.
1807 Park 270 Drive, Ste. 300
St. Louis, MO 63146
Ph. 314/878-7707
Fax 314/878-7616
Contact: David M. Tugend
U.S. Feed Market Study-A point-in-time measurement of brands and types of beef, dairy, and swine feeds purchased by U.S. farmers.(s)
Animal Health Market Study-Identifies market share of anthelmentics, biologicals, feed medications, implants, pharmaceuticals and probiotics used by U.S. beef, dairy & swine farmers.(s)
Dealers Attitudes Toward Chemical Manufacturers-A national dealer rating of U.S. manufacturers of agricultural chemicals. (s)
Pesticide Profile-Data base study that projects total product volume use across all crops and within each crop the product is used on.(s)
Seed Corn Market Study-Quantification of seed corn market in terms of acres planted, purpose for seed selection and source of purchase.(s)
(See Advertisement on Page 30)

The Dohring Company
255 No. Glendale Ave., Ste. 300
Glendale, CA 91206
Ph. 818/242-1600
Fax 818/242-3975
Contact: Guy White
Southland Cooperative Survey(o)

Ehrhart-Babic Assoc.
120 Route 9W
Englewood Cliffs, NJ 07632
Ph. 201/461-6700
Fax 201/461-0435
Contact: Donald Harkin
National Alcoholic Beverage Index(s)
National Retail Tracking Index(s)

Gallup Canada, Inc.
180 Bloor St. W., 10th Floor
Toronto, ONT, M5S 2V6
Ph. 416/961-2811
Fax 416/961-3662
Contact: Lorne Boxinrof
National ConsumerScan Omnibus(o)
Syndicated Retirement Savings Plan Survey(s)

Gallup & Robinson, Inc.
575 Ewing Street
Princeton, NJ 08540
Ph. 609/924-3400
Fax 609/921-2748
Advertising Impact Research Services(s)

Gartner Group, Inc.
56 Top Gallant Rd.
Stamford, CT 06904
Ph. 203/964-0096
Fax 203/324-7901
Contact: Oakey Mertz
Computer Studies(s)

Graham Research Service, Inc.
20 East 46th Street
New York, NY 10017
Ph. 212/986-8301
Fax 212/297-9025
Contact: Robert Schultz
GRIPS/Graham Research Idea Position Screening(s)

GrayLab Research®, Division of The Creative Group
31800 Northwestern Hwy.
Farmington Hills, MI 48334
Ph. 313/855-7813
Fax 313/855-2368
Contact: Brett Blackwell
Specialized market segment research conducted among the "mature" market. Older and elderly adults, including 55-and-older "empty nesters," grandparents, active and soon-to-be retirees, mature and elderly senior citizens (and their children).
Grandparentor℠- Annual study on awareness, buying behavior and media measurements. (conducted jointly with PlayLab Research® (s/o)

Healthcare Communications, Inc.
CN 5273
Princeton, NJ 08543
Ph. 609/452-0211
Contact: Mahesh Naithani
Various Medical Studies(s)

Hispanic Marketing Research
4550 Northwest Loop 410, #140
San Antonio, TX 78229
Ph. 512/736-2000
Contact: Dr. Naghi
Hispanic Annual House-To-House Survey-Impact(o)
Hispanic Annual House-To-House Survey-Interface(s)

HTI Custom Research, Div. NPD Group
900 West Shore Road
Port Washington, NY 11050-0402
Ph. 516/625-0700
Fax 516/625-2222
Contact: Lynne Armstrong
Insta-Vue(o)

Hospital Research Associates
One Gothic Plaza, Hollywood & Rte 46W
Fairfield, NJ 07004-2402
Ph. 201/575-3650
Contact: Norman Goldberg
Medical Related Studies(s)

ICR Survey Research Group
605 West State Street
Media, PA 19063
Ph. 215/565-9280
Fax 215/565-2369
Contact: Fred Soulas
EXCEL-A consumer omnibus using RDD sampling and CATI interviewing. One week turnaround for each of two samples of 1000 interviews each week.
Teen EXCEL-Same procedure as regular EXCEL except the weekly sample size is 125 of which half are male teens and half are female teens.
(See Advertisement on Page 35)

IMR Research
140 Burlington
Clarendon Hills, IL 60514
Ph. 708/654-1077
Fax 708/654-0147
Contact: George Griffin
Continuing Consumer Survey-U,S.(s)
Continuing Consumer Survey-Canadian(s)
Continuing Consumer Automotive Maintenance Survey(s)

Info Corp.
2880 Lakeside Drive
Santa Clara, CA 95054
Ph. 408/980-4300
Contact: Skip Bushee
Computer Industry Studies(s)

Information Resources, Inc.
150 N. Clinton
Chicago, IL 60661
Ph. 312/726-1221
Fax 312/726-8214
InfoScan(s)

International Demographics, Inc.
3000 Richmond Avenue
Houston, TX 77098
Ph. 713/522-1016
Contact: Robert Jordan
The Media Audit(s)
The Financial Audit(s)

Interviewing Service of America
16005 Sherman Way, Ste. 209
Van Nuys, CA 91406-4024
Ph. 818/989-1044
Fax 818/782-1309
Contact: Michael Halberstam
Surveys Asian-Americans(s)

MacKay & Company
One Imperial Place, #300
Lombard, IL 60148
Ph. 708/916-6110
Fax 708/916-4116
Agricultural Equipment Parts Market(s)
U.S and Canadian Heavy Truck Parts Market(s)

SUBSCRIBE TODAY!

Please enter my subscription for one year (10 issues) of *Quirk's Marketing Research Review*. If not satisfied after my first issue I may cancel and be refunded the entire amount of my subscription. Afterwards I may cancel at any time and be immediately refunded my money for all issues not received.

☐ Payment of $40 enclosed   Charge Credit Card   ☐ MasterCard   ☐ Visa

______________________ ____________ ______________________________

CHARGE ACCOUNT NUMBER   EXPIRATION   SIGNATURE (REQUIRED FOR ALL CREDIT CARD ORDERS)

Name ______________________________ Title ______________________________

Company ____

Address ____

City ______________________ State __________ Zip ______________________

Are you a Purchaser of Marketing Research Products/Services?   ☐ Yes   ☐ No

Areas of Research Interest (Check All That Apply)

☐ Consumer Non-Durable   ☐ Service (Banks, Ins., Etc.)   ☐ Health Care
☐ Consumer Durable   ☐ Business-To-Business   ☐ Other (Specify) ______________

PLACE
STAMP
HERE

Quirk's
MARKETING RESEARCH
Review

P.O. Box 23536
Minneapolis, Minnesota 55423

Codes:
S=Syndicated
O=Omnibus

Maritz Marketing Research, Inc.
1297 North Highway Drive
Fenton, MO 63099
Ph. 314/827-1610
Contact: Roy Cleveland, V.P.
Farmers' Pesticide Use Study-Annual syndicated study among 30,000 growers which provides brand share and tracking of farm pesticide usage in the U.S. and Canada.(s)
Farmers' Pesticide Satisfaction Study-Annual syndicated study with growers providing information on growers' satisfaction with pesticide products.(s)
Golf Course Pesticide Use Study-Study with 1,500 golf course superintendants determines pesticide use practices and brand shares in the U.S.(s)
Pesticide Use Study On Specialty Crops-Study provides brands and dollar expenditures for pesticides on 19 vegetable and 18 fruit, nut and vine crops.(s)
(See Advertisement on Page 44)

Maritz Marketing Research, Inc.
3035 Moffat Drive
Toledo, OH 43615
Ph. 419/841-2831
Contact: Kathy Keim, Rsch Mgr.
Initial Buyer Study-Syndicated study among early buyers of recently introduced automotive vehicles.(s)
(See Advertisement on Page 44)

Maritz Marketing Research, Inc.
400 No. Schmidt Road
Bolingbrook, IL 60439
Ph. 708/759-0700
Fax 708/759-9611
Contact: Beth Nieman, Rsch. Mgr.
SuperScreen(o)-A uniquely cost-effective vehicle for locating low-incidence consumers, strengthening study designs or just tapping into a continous daily telephone dialog with the nation's consumers. Interviews with 1,550 households every day, except holidays.(o)
(See Advertisement on Page 44)

Market Facts, Inc.
676 No. St. Clair,
Chicago, IL 60611
Ph. 312/280-9100
Fax 312/280-8756
Contact: Tom Mularz
TeleNation(o)
Data Gage(o)
Mini Screen(o)

Market Facts of Canada
77 Bloor St. West, 12th Flr.
Toronto, ON M5S 3A4
Ph. 416/964-6262
Fax 416/964-5882
Contact: Jean de Boerf
National Flexibus Mail Panel(o)

Market Trends Research
3633 136th Place SE, #110
Bellevue, WA 98006-1451
Ph. 206/562-4900
Fax 206/562-4843
Contact: Mike Dunn
Washington/Oregon Opinion Monitor(o)
Mystery Shopper Program(s)

Marketing Evaluations/TVQ
14 Vanderventer Ave
Port Washington, NY 11050
Ph. 516/944-8833
Contact: Steven Levitt
Cartoon Q(s)
Performer Q(s)
Product Q(s)
Sports Q(s)

OMNIBUS/SYNDICATED RESEARCH STUDIES

Codes:
S=Syndicated
O=Omnibus

The Marketing Workshop, Inc.
3294 Medlock Bridge Rd., # 200
Norcross, GA 30092
Tel. 404/449-6767
Fax 404/449-6739
Contact: Jim Nelems
Guest-Track(s)

Mediamark Research, Inc.
708 Third Ave
New York, NY 10017
Ph. 212/599-0444
Fax 212/682-6284
Contact: Teresa Gannon
The Study of The American Consumers(s)

Mendelsohn Media Research, Inc.
841 Broadway
New York, NY 10003
Ph. 212/677-8100
Fax 212/677-8833
Contact: Fred L. Engelman
Survey of Adults & Markets of Affluence(s)

Metromark Market Research, Inc.
3030 Devine Street
Columbia, SC 29205
Ph. 803-256-8694
Contact: Emerson Smith
South Carolina Omnipoll(o)

MRCA Information Services
2215 Sanders Rd.
Northbrook, IL 60062
Ph. 708/480-9600
Fax 708/480-9600
Contact: Jack Abrams
Menu Census(s)
Health Care Remedies Usage Study(s)

MRCA Information Services
4 Landmark Square
Stamford, CT 06901
Ph. 203/324-9600
Contact: Rudy Nadilo
Packaged Goods Purchases(s)
Soft Goods Information(s)

NFO Research, Inc.
2 Pickwick Plaza
Greenwich, CT 06830
203/629-8888
Contact: Lawrence D. White
CARS/Carpet and Rug Study(s)
Multicard(o)
NFO Travels America(s)
SIP/Share of Intake Panel(s)
National Yellow Pages Monitor(s)

A.C. Nielsen
Nielsen Plaza
Northbrook, IL 60062
Ph. 708/498-6300
Fax 708/498-7280
Scantrack(s)
Scantrack Household Panel Services(s)

The NPD Group
1300 W. Higgins Road/#300
Park Ridge, IL 60068
Ph. 708/692-6700
Fax 708/692-6049
Contact: Bob O'Brien
Crest(s)

The NPD Group
900 W. Shore Rd
Port Washington, NY 11050
Ph. 516/625-2220
Fax 516/625-2222
Contact: Lynne Armstrong
Insta-Vue(o)

O'Neil Associates, Inc.
412 E. Southern Avenue
Tempe, AZ 85282
Ph. 602/967-4441
Fax 602/967-6122
Contact: Michael O'Neil
Valley Monitor(o)

ORC Information Services
Subsidiary of Opinion Rsch Corp.
P.O. Box 183
Princeton, NJ 08542
Ph. 800/999-0213
Fax 800/759-5786
Contact: Lynne Ross
Caravan-National telephone omnibus survey of 1,000 adults conducted weekly, Thursday through Sunday. Preliminary results delivered Monday. Full tabulations delivered Tuesday. CATI interviewing utilizing most up-to-date RDD sample available. In house, professional interviewers and data processing staff.(o)
Executive Caravan-Monthly survey of senior and mid-level managers. Some waves have special industry focus, e.g., pharmaceuticals, financial services, travel.(o)
Central European Info. Base-A human resources survey providing basic consumer opinion research for Hungarian, Czechoslovakian, and Polish markets.(s)
Corporate Reputations Today-A survey providing an objective, independent assessment of the U.S. public's perception of participating companies, their competitors, their industries, and business in general.(o)
Executive Caravan Business & the Media-Evaluates company standings in the view of media professionals.(o)
Executive Caravan Corporate Image-A survey of senior and mid-level managers, measuring their perceptions of leading corporations. (o)
(See Advertisement on Page 37)

Perception Rsch Services, Inc.
440 Sylvan Avenue
Engelwood Cliffs, NJ 07632
Ph. 201/568-8151
Fax 201/568-7111
Contact: Elliot Young
PRS/FSI Monthly Audit(s)

PlayLab Research®, Division of The Creative Oroup
31800 Northwestern Hwy.
Farmington Hills, MI 48334
Ph. 313/855-7812
Fax 313/855-2368
Contact: Brett Blackwell
The leader in the design, conduct and analysis of children marketing and advertising research with a national reputation for project performance and results.
Forcastor℠-New product concept research and volume sales projections. (s/o)
Requestor℠- Annual study covering children's purchase request/ brand specification impact. (s/o)
Grandparentor℠- Annual study on awareness, buying behavior and media measurements. (conducted jointly with GrayLab Research® (s/o)

J.D. Powers and Associates
30401 Agoura Road
Agoura Hills, CA 91301
Ph. 818-889-6330
FAX 818-889-3719
Various Automotive & Truck Studies (s)
Tire Satisfaction Index Study (s)
Computer End-User Studies (s)
CSA/Consuer Satisfaction (s)

Profile Market Research
4020 So. 57th Avenue
Lake Worth, FL 33463
Ph. 407/965-8300
Fax 407/965-6925
Contact: Judy A. Hoffman
South Florida Omnibus(o)

Restaurant Research Associates
202 Fashion Lane/Ste 101
Tustin, CA 92680
Ph. 714/731-7775
Fax 714/731-7759
Contact: Ron Clark
Flexi-Trak(s)
Los Angeles/Orange Family Restaurant Tracking(s)

Rockwood Research Corp.
1751 W. County Road B
St. Paul, MN 55113
Ph. 612/631-1977
Fax 612/631-8198
Contact: Jodie Wehrspann
AgTel Studies-Series of studies conducted monthly covering a variety of agricultural crops, livestock and management categories(o)
(See Advertisement on Page 18)

Roper College Track Inc.
595 Madison Avenue
New York, NY 10022
Ph. 212/319-5880
Contact: Stuart Himmelfarb
College Track(s)

The Roper Organization
566 E. Boston Post Road
Mamaroneck, NY 10543
Ph. 914/698-0786
Contact: Jean Henry
Limobus(o)

Russell Marketing Research Inc.
152 E. 71 Street
New York, NY 10021
Ph. 212/879-3350
Fax 212/535-4543
Contact: Rachel Golden
Qualitest-NYC MSA(o)

Simmons Market RschBureau
380 Madison Avenue
New York, NY 10017
Ph. 212/916-8900
Fax 212/916-8918
Contact: Thomas Murphy
Kids Study(s)
Simmons Teen Age Research Study(s)
Study of Media and Markets(s)
Study of Media & Markets For Foodservice Industry(s)
Top Management Insight(s)

The Sinrod Marketing Group
76 No. Broadway
Hicksville, NY 11801
Ph. 516/433-3200
Fax 516/433-3201
Contact: Barry Sinrod
Various Surveys of Mothers(o)
Laser National Telephone Omnibus(o)

Codes:
S=Syndicated
O=Omnibus

Lee Slurzberg Research, Inc.
158 Linwood Plaza
Ft. Lee, NJ 07024-3704
Ph. 201/461-6100
Contact: Lee Slurzberg
LSR New York Hispanic Omnibus(o)

Southeastern Institute of Research
2325 W. Broad Street
Richmond, VA 23220
Ph. 804/358-8981
Fax 804/358-9761
Contact: Robert M. Miller
Insight Studies-Tidewater, Baltimore, Richmond and Washington D.C.(o)

SPAR/Burgoyne
One Centennial Plaza
Cincinnati, OH 45202-1909
513/621-7000
Contact: Thomas Schneider
Burgoyne Limited Item Syndicated Service(s)
Hot Button Sweep(s)

Strategy Research Corporation
100 NW 37th Avenue
Miami, FL 33125
Ph. 305/649-5400
Fax 305/649-6312
Contact: Jim Loretta, VP
U.S. Hispanic Omnibus(o)

Teenage Research Unlimited
601 Skokie Blvd.
Northbrook, IL 60062
Ph. 708/564-3440
Fax 708/564-0825
Contact: Peter Zollo
Teenage Media/Market Study(s)

Total Research Corporation
Princeton Corporate Center
5 Independence Way
Princeton, NJ 08540
Ph. 609/921-8100
Fax 609/987-8839
Contact: Dave Smallen
EquiTrend(s)

Trendata, Inc.
9 Mott Ave., Ste. 201
Norwalk, CT 06850
Ph. 203/866-3113
Fax 203/853-2228
Contact: Louis Pappalardo
Trendata Report(s)

U.S. Travel Data Center
Two Lafayette Centre
1133 21st Street N.W.
Washington DC 20036
Ph. 202/293-1040
Fax 202/293-3155
Contact: Elizabeth Stewart
NTS/National Travel Survey(o)

Video Storyboard Tests
107 E. 31st Street
New York, NY 10016
Ph. 212/689-0207
Fax 212/689-0210
Contact: Dave Vadehra
Campaign Monitor(s)

The Wagner Group, Inc.
53 West 21st Street
New York, NY 10010
Ph. 212/627-0066
Contact: Jeffrey Wagner
College Scan(o)

West Group Mktg. Rsch.
1110 E. Missouri Ave/#780
Phoenix, AZ 85014
Ph. 602/264-4915
Contact: Glenn Iwata
WestTrack Market Monitor-Phoenix, Tucson(o)

Youth Research, CSi
246 Federal Rd., Ste. B-22
Brookfield, CT 06804
Ph. 203/797-0666
Fax 203/748-1735
Contact: Karen Forcade
Youth Research Omnibus(o)

OMNIBUS/SYNDICATED RESEARCH STUDIES

Codes:
S=Syndicated
O=Omnibus

Advertising
Advertising Research Corporation(s)
Beta Research(s)
Gallup & Robinson(s)
Graham Research Service(s)
Healthcare Communications(s)
International Demographics(s)
Marketing Evaluation/TVQ(s)
NFO Research(s)
Perception Research Services(s)
Simmons Market Research Bureau(s)
Video Storyboard Tests(s)

Agricultural
Doane Marketing Research(s)
MacKay & Co.(s)
Maritz Marketing Research(s)
Rockwood Research Corp(o)

Asian Americans
Interviewing Service of America(s)

Automotive
IMR Research(s)
Maritz Marketing Research(s)
J. D. Power and Associates (s)

Black
Bruskin Associates(o)

Business-To-Business
Mediamark Research, Inc.(s)
ORC Information Services(o)

Carpeting
NFO Research(s)

Chemical Industry
Chemark Consulting(s)

Children
Children's Market Research(s)
PlayLab Research(o/s)
Simmons Market Research Bureau(s)
Youth Research, CSi(o)

College Students
The Wagner Group(o)
Roper College Tracking(s)

Computers
Gartner Group Inc(s)
Info Corporation(s)
J. D. Power and Associates (s)

Consumer(Local)
Behavior Research-AZ(o)
Dittman Research-AK(o)
The Dohring Company-CA(o)
Market Trends-WA(s)
Metromark Market ResearchSC(o)
O'Neil Associates-AZ(o)
Profile Marketing Research-FL(o)
Russell Marketing Rsch.-NY MSA(o)
SE Institute of Rsch-Mid.Atl.(o)
West Grp. Mktg. Rsch.-AZ(o)

Consumer-Canada
Canadian Facts(o)
Creative Research Group(s)
Gallup Canada(s)
Gallup Canada(o)
IMR Research(s)
Market Facts of Canada(o)

Consumer-U.S.
Irwin Broh Assoc.(s)
Bruskin Associates(o)
Cambridge Reports(o)
Cambridge Reports(s)
Custom Research Inc.(o)
HTI Custom Research(o)
ICR Survey Research Group(o)
IMR Research(s)
Maritz Marketing Research(o)
Market Facts, Inc.(o)
Mediamark Research, Inc(s)
Mendelsohn Media Research(s)
NFO Research(o)
A.C. Nielsen(s)
The NPD Group(s)
ORC Information Services(o)
J. D. Power and Associates (s)
The Roper Organization(o)
The Sinrod Marketing Group(o)
Total Research Corporation(s)
Trendata, Inc.(s)

Executives
ORC Information Services(o)

Financial
International Demographics(s)
ORC Information Services(o)

Food/Beverage
Com-Sci Systems(s)
Com-Sci Systems(o)
Danis Research(s)
Ehrhart-Babic Assoc.(s)
MRCA Info. Svcs.(s)
NFO Research(s)
The NPD Group(s)
Simmons Market Research Bureau(s)

Grandparents
Graylab Research (o/s)

Health Care/ Medical
Beta Research(o)
Irwin Broh Assoc.(s)
Healthcare Communications(s)
Hospital Research Assoc.(s)
MRCA Info. Svces.(s)

Hispanic
Analysis Research Limited(o)
Behavior Research Center(s)
Hispanic Marketing Research Communication(o)
Hispanic Marketing Research Communications(s)
Lee Slurzberg Research, Inc.(o)
Strategy Research Corp.(o)

International
ORC Information Services(o)

Lodging Industry
The Marketing Workshop, Inc.(s)

Management
ORC Information Services(o)
Simmons Market Research Bureau(s)

Media
Advertising Research Corporation(s)
American Sports Data(s)
Beta Research Corporation(s)
International Demographics(s)
Marketing Evaluations-TVQ(s)
Mediamark Research, Inc.(s)
ORC Information Services(o)
Simmons Market Research Bureau(s)

Mothers
PlayLab Research
Sinrod Mktg Grp(o)

Pharmaceuticals
ORC Information Services(o)

Restaurants/Fast Foods
The NPD Group(s)
Restaurant Research Assoc.(s)

Retail
Ehrhart-Babic Assoc.(s)
Information Resources(s)
MRCA Info. Svces.(s)
A. C. Nielsen(s)
Spar/Burgoyne(s)

Seniors
Graylab Research (o/s)

Sports
American Sports Data, Inc.(s)
Irwin Broh Assoc(s)

Teens
Bruskin Associates(o)
ICR Survey Research Group(o)
PlayLab Research(s/o)
Simmons Market Research Bureau(s)
Teenage Research Unlimited(s)

Textiles
MRCA Info. Svces.(s)

Tires
J. D. Power and Associates (s)

Toys
PlayLab Research(s/o)

Travel
Irwin Broh Assoc.(s)
NFO Research(s)
ORC Information Services(o)
U.S. Travel Data Center(o)

Trucking
McKay & Company(s)

Chick-fil-A

continued from p. 7

gust, the agency faxed four new ideas to the client. Almost instantly the client responded that "Eat Lite! Save Right!" hit the proper note. A tag line was added—"Save on These Lite Menu Items, All Under 300 Calories"—bringing the first stage of research and development to a close. It was time to market-test the promotion.

Market testing begins

"We had two primary goals with the test: to increase awareness of Chick-fil-A and its products, and to make the cash register ring. Based on those criteria, we would know if we were moving in the right direction," says RHK's Rebecca Finn.

The test was conducted in October in three cities: Pittsburgh (four units), Columbia, South Carolina (five units), and Macon, Georgia (three units). Product promotion was primarily through coupons, banners, posters, table tents and continuity cards. Customer intercepts were conducted with 610 patrons, with varying results.

In all, 49 percent of those interviewed were aware of the promotion. The number climbed to 67 percent in Macon, where the campaign was more thoroughly promoted than in other cities: prominent lettering on an exterior sign and extensive in-store displays in one unit seemed to make a major difference.

Nearly 60 percent of all customers interviewed had purchased items included in the "Eat Lite! Save Right!" campaign, but only 14 percent said they had purchased these items because of the promotion. Not surprisingly, stronger response was seen in Macon, where the campaign was being most energetically pursued.

Coupons were distributed in a variety of ways: some were placed in bags, some were handed out, and some were left on the counter to be picked up. Among customers surveyed, about one-third had received coupons, with just 7 percent using them.

When asked if the campaign to "Eat Lite! Save Right!" left them with a more positive feeling about Chick-fil-A, 72 percent said yes and 28 percent said it had no effect on their opinion. Further, 95 percent viewed the "Eat Lite! Save Right!" menu items as more nutritious than other fast-food menu selections.

As for sales, while there was very little short term impact, there was significant long-term potential: thirteen percent responded that they now visited Chick-fil-A more frequently as a result of the promotion, but 53 percent indicated they would come back more often in the future as a result of the campaign.

Finn says that operators of the test units were interviewed during the promotion and completed a written survey. Those results were combined with the customer intercept study to gauge the success of the campaign.

"Did the cash register ring? Yes, but not as much as we'd hoped. Did we heighten awareness of the client and its products? No question about it. Our next step was to make some revisions to the campaign and examine it again," Finn says.

The decision was made to underscore the money-saving aspect of the promotion. "Buy 2, Get 1 Free"—which included a Super Savor Card—replaced "Save On These Lite Menu Items-All Under 300 Calories," as the primary tag line. "Lite Bite" was introduced to reinforce the nutrition theme, which had scored well in the intercepts.

Focus groups

With these alterations, the "Eat Lite! Save Right!" and "Buy 2, Get 1 Free" themes were bundled in among a number of others that were shown to focus groups in Dallas and Orlando in December. The findings were extremely encouraging.

"Eat Lite! Save Right!" was presented as a Chargrilled Chicken Sandwich with small salad and 20-ounce drink in Dallas and Orlando at two different price points. It produced very favorable responses with both focus groups, particularly in Orlando, where the lower price point prompted some respondents to say they'd "drive right by a KFC for a deal like that." General consensus was that the theme was effective in enticing light users or non-users to give Chick-fil-A a try.

One suggestion that came out of the focus groups was to caption the specific calorie count for each of the three items (or provide a total count for the group). Another was to make the price stand out from a distance. Several felt the 20-ounce drink could be downplayed, echoing the opinion offered by the operator panel earlier in the year.

The groups also agreed that the "Buy 2 Get 1 Free" was effective, primarily because of the word "free." The offer was for a regular or deluxe Chargrilled sandwich and/or large salad with chicken strips. Some participants felt this theme would appeal more to regular customers, who knew they would be inclined to redeem the coupon, or to groups of two or more, since with two purchases the group could claim a free selection.

These results were very gratifying, leaving agency and client to simply fine-tune the promotion and prepare the collateral materials. However, they did make one final change, Finn says. "We decided to let the tag line (Buy 2, Get 1 Free) carry the savings message on its own, since the focus groups were so positive about the tag line's impact. That allowed us to revise the main theme to 'Eat Lite! Tastes Right!,' which adds a flavor element to the low-calorie, low-cost lines."

By mid-January of this year everything was on schedule. Two Chick-fil-A marketing executives flew to Omaha for a one-day review of the final collateral material. But shortly before 5 p.m. that day a legal advisor phoned to report that the phrases "eat lite" and "lite bite" were copyrighted by another company. This meant reworking the very theme that had been the core of the campaign. In a two-hour session the next morning, RHK's creative team, account executives and the Chick-fil-A executives crafted new copy and designs to replace every "lite bite" reference. Suzan Clogston, RHK's creative director, remembers the session vividly: "What normally happens over several weeks was telescoped into a wild, rapid-fire mad dash. But it worked! Of course, having the client participate in our creative scramble was a big plus."

It was agreed that operators would receive two promotion kits for the six-week campaign. The first was to target the three weeks before Easter, when traffic is high. It would concentrate on the main theme—"Buy 2, Get 1 Free With Your Super Savor Card"—in order to develop consumer interest. The second kit was to highlight "Only 305 Calories—Chargrilled Lite Meal." Consumers would still be able to redeem the Super Savor card.

After the operator panels, the intercepts, the focus groups and regular discussions with marketing department executives, Chick-fil-A and RHK had reason to believe they had designed a promotion that would appeal to their regular consumers while attracting new ones and building consumer loyalty.

"The final sales figures show that our spring campaign was very, very successful," says RHK's Rebecca Finn. "For March, Chick-fil-A's sales were up 13 percent. That's a gratifying sales increase in any economy, but at a time when retail sales are down nationwide, when mall traffic is down everywhere, and when competition from other fast feeders continues to grow, 13 percent is extraordinary." With real disposable income down three straight quarters and real income continuing to slide, that boost in sales becomes even more significant, she adds.

Sales were even for April, compared to a 22 percent jump in April the year before. "But 'even' is pretty remarkable, too, when you consider two factors in 1990 that affected that year's results: Chick-fil-A introduced a new product, and holiday shopping continued right into the middle of the month since Easter fell on April 15th," says RHK's Jeff Kahler. Easter was on March 31 in 1991.

Post-campaign research

With the campaign over, follow-up research has begun, Finn says. "As before, we are pursuing the same basic issues: did we increase awareness of the chain and its products, and did we increase sales? This regular analysis is important in helping us decide whether to repeat this campaign and in designing future promotions," she says.

A written survey was distributed to operators, asking them to rate the promotion on a one to five scale. The operators gave the campaign a four. "That's a great rating. A five is the highest you can get, and that's very rare," Finn says.

At the next operators panel, the campaign will be analyzed further, and Chick-fil-A operators will be asked if they would participate in it if it were brought out again. "When all is said and done, feedback from the ones who have to carry out a program is often more valuable than any other kind," Finn says. ❑

Survey Monitor

continued from p. 19

as substantially more important and more difficult than five years ago.

Doctors iufluence cousumer OTC purchases

When buying non-prescription medications, a doctor's recommendation is the single most important factor influencing consumer decision, according to a new national survey. An overwhelming majority (69%) of the population say they listen first to a doctor's opinion regarding over-the-counter (OTC) products, while only seven percent consider price to be the most influential factor.

"This study illustrates just how much American consumers rely on their physicians for advice, even when selecting an over-the-counter medication," says Susan S. Smirnoff, senior vice president of Ruder Finn, Inc., the New York-based firm that commissioned the survey. "The finding is significant given the consumer trend of self-medication as a way to reduce escalating health care costs."

Respondents were also asked to weight by varying level of importance five factors which affect their buying decisions. Topping the list of what is considered "very important" is advice from a doctor (79%) and a pharmacist (51%). Twenty-eight percent say price is "very important" to their purchase decision, followed by a friend or relative's recommendation (18%) and advertisements (8%).

Older Americans appear more likely to be influenced by their doctor's recommendation. Seventy-four percent of adults 45 years of age and older cite a physician's opinion as the most important factor in determining which medicine to buy, compared to 63% of those under the same age.

The survey also reports encouraging news for the media and advertisers, as more than one-third (38%) of those questioned feel advertisements are at least "somewhat important" in terms of their OTC decision-making process.

Sales Offices

Headquarters: *Quirk's Marketing Research Review*,
6607 18th Ave. So.,
Minneapolis, MN 55423.
Phone & fax (612) 861-8051.

West Coast: Lane E. Weiss,
582 Market St., Suite 611,
San Francisco, CA 94104.
(415) 986-6341.

Trade Talk

continued from p. 42

up keeping children 25 minutes in a central location study and they get kind of itchy.

"I'm a believer in keeping it simple and keeping it short. You can still ask the kids questions and get lots of good answers but you need to keep their interest up. And the kids are really helping you so you need to keep reinforcing that so they get some pride in what they're doing."

In general, clients don't have unreasonable expectations about what kind of information they can obtain from young consumers, Forcade says, but they sometimes try to meet all of their research objectives with just one study. "They really should go through a progression where everything goes in sequence--for example, first let's do this and tighten up these objectives and then fine tune it with this and go back in the second half and ask x amount of different children in the same market area. You have to take it step by step."

Despite the young ages of the respondents, Forcade says that she and her staff generally don't have trouble getting kids to talk about their habits and preferences. When asking the questions, it is important to place them in a context the kids can understand, she says. "It involves getting them to focus on things, putting them in a situation so that they can identify with it. For example, when asking about their radio listening habits we said, 'What about when you're in Mom's car, do you listen to the radio?' rather than, 'How often do you listen to radio? More than once a day, once a day, more than once a week?' Those are kind of big questions for little children."

Not surprisingly, Forcade has found that television is definitely the dominant medium for kids. "It's becoming even more so. As much as their parents will allow them, they will watch. Often they would just as soon sit and be young couch potatoes. It's easier to sit and be entertained than to try to do it yourself."

Forcade says that when children are asked about ads they've seen, they often describe situations or scenes from the commercials but have trouble recalling the brands represented. The study also found little recall of the content of radio ads or the brands mentioned.

However, children are becoming more brand-conscious, Forcade says. In one area of the recent omnibus, a majority of children singled out Doritos by name as a favorite snack food. "That was quite a surprise. They didn't say 'chips' or 'potato chips,' they said 'Doritos.' I think kids are becoming a little more savvy. The commercials are being geared to children today whereas five or ten years ago they were much more general." ❑

Classified

Listing Additions

The following is a correction to the 1991 Directory of Focus Group Facilities:

Adler Weiner Research Company
6500 N. Lincoln Avenue, #200
Lincolnwood, IL 60645
Ph. 708-675-5011
FAX 708-675-5698
Contact: Betty Weiner
1,3,4,6,7C

The following focus group facilities were inadvertently omitted from the 1991 Directory of Focus Group Facilities:

Gikas International
11611 Old Georgetown Road
Rockville, MD 20852
Ph. 301-468-2380
Contact: Ellen Rosenthal
1,3,4,6,7B

Gikas International
2146 E. Lincoln Ave.
Anaheim, CA 92806
Ph. 714-778-4937
Contact: Nancy Fidel
1,3,4,6,7A

Gikas International
Cinderella City Mall
701 W. Hampden Ave., Suite 215
Englewood, CO 80110
Ph. 303-789-0565
Contact: Dunlap Scott
1,3,4,6,7A

Gikas International
5515-1 North 7th Street
Phoenix, AZ 85014
Ph. 602-265-2890
Contact: Cathie Coppes
1,3,4,5,6,7A

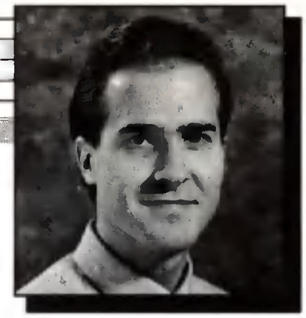
Whaley Research & Associates, Inc.
5001 Riverdale Court
College Park, GA 30337
Ph. 800-633-1652
Contact: Marilynn Whaley
1,3,4,6,7D

The following is a correction to the 1991 Directory of Telephone Research Facilities:

Whaley Research & Associates, Inc.				
5001 Riverdale Court	50	50	50	50
College Park, GA 30337				
Ph. 404-991-2588				
FAX 404-991-4904				
Contact: Marilynn Whaley				

TRADE TALK

by Joseph Rydholm
managing editor



Omnibus study talks to kids

As part of its regular quarterly omnibus survey of children, Brookfield, Connecticut-based Youth Research recently interviewed 300 boys and girls—one half of the group from 6 to 8 years old, one half 9 to 12 years old.

Generally speaking, the study, which included questions on favorite snack foods, television shows, commercials, buzzwords, and movies, found little difference between the answers of boys and girls. The main differences were found in the responses to magazine preferences. For example, the older boys singled out *Sports Illustrated for Kids* as a favorite while the girls liked *Teen Beat*.

One of the most surprising findings of the study was that 6-12 year old kids listen to radio—perhaps more than marketers think they do, says Karen Forcade, president of Youth Research. "Most of the advertising on radio is for the older teens because teenagers are really into their radios. But we haven't given the younger children much credit that they listen to the radio or that they're aware of commercials. I think it's a completely untapped market."

The one-on-one interviews were conducted in mall locations. Kids were recruited through intercepts with their mothers. The interviews—which typically lasted about 8 minutes—were kept short to avoid taxing attention spans, Forcade says.

Forcade

Kids' attention spans are one thing that some clients overlook when developing questionnaires for young respondents, Forcade says. "(The questionnaires) keep going through the approval process and people keep adding questions, 'Well let's ask *this* question, let's add *that* question, and why don't we talk about *this* also.' And so you end

continued on p. 41