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Business-to-business issue

April, 1992

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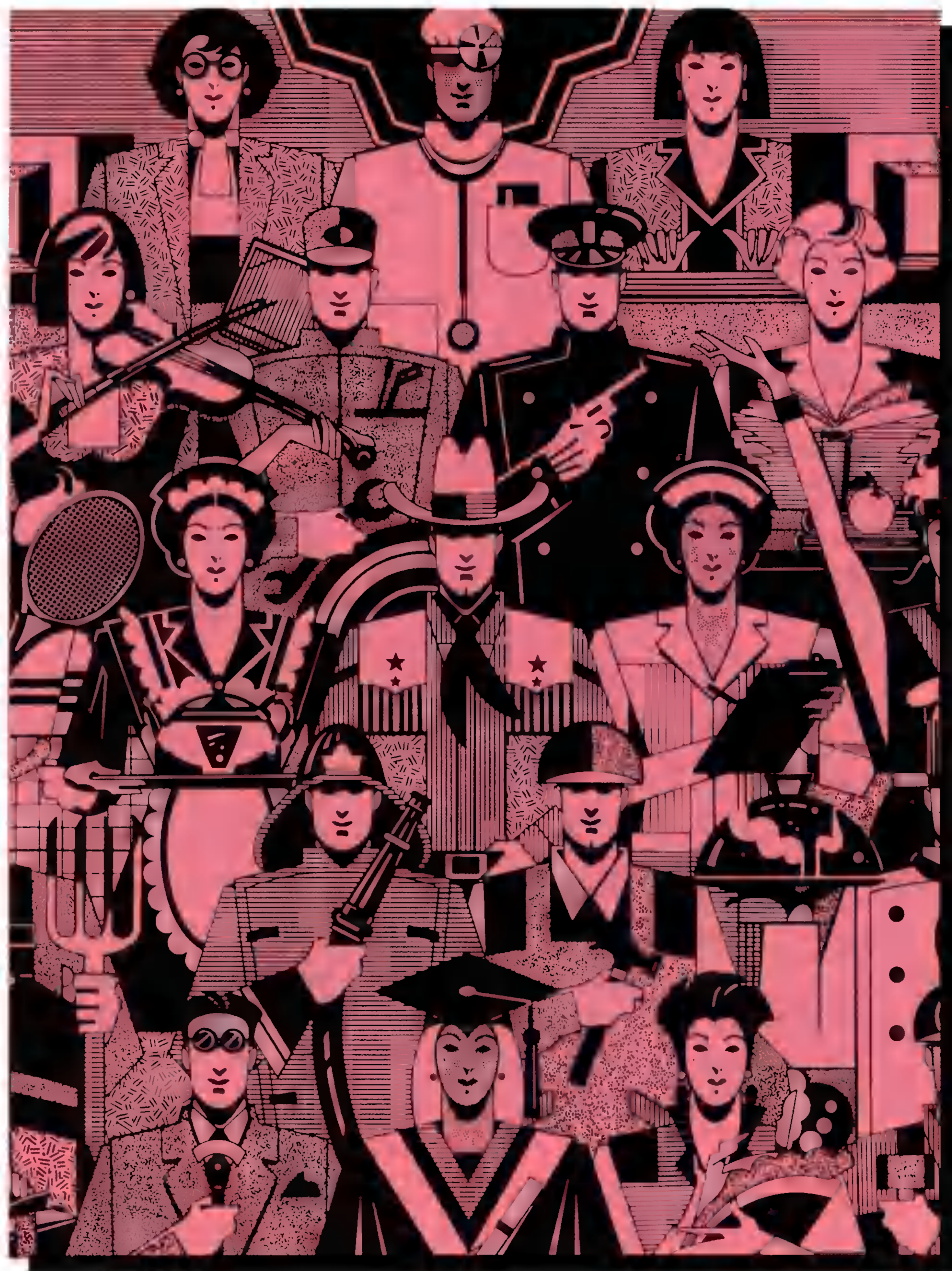
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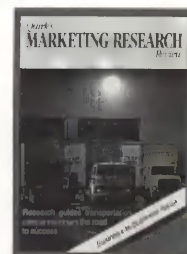
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### Cover

This month's cover story looks at how some transportation firms are using research to find new business. Photo courtesy of Daylight Transport, Los Angeles.



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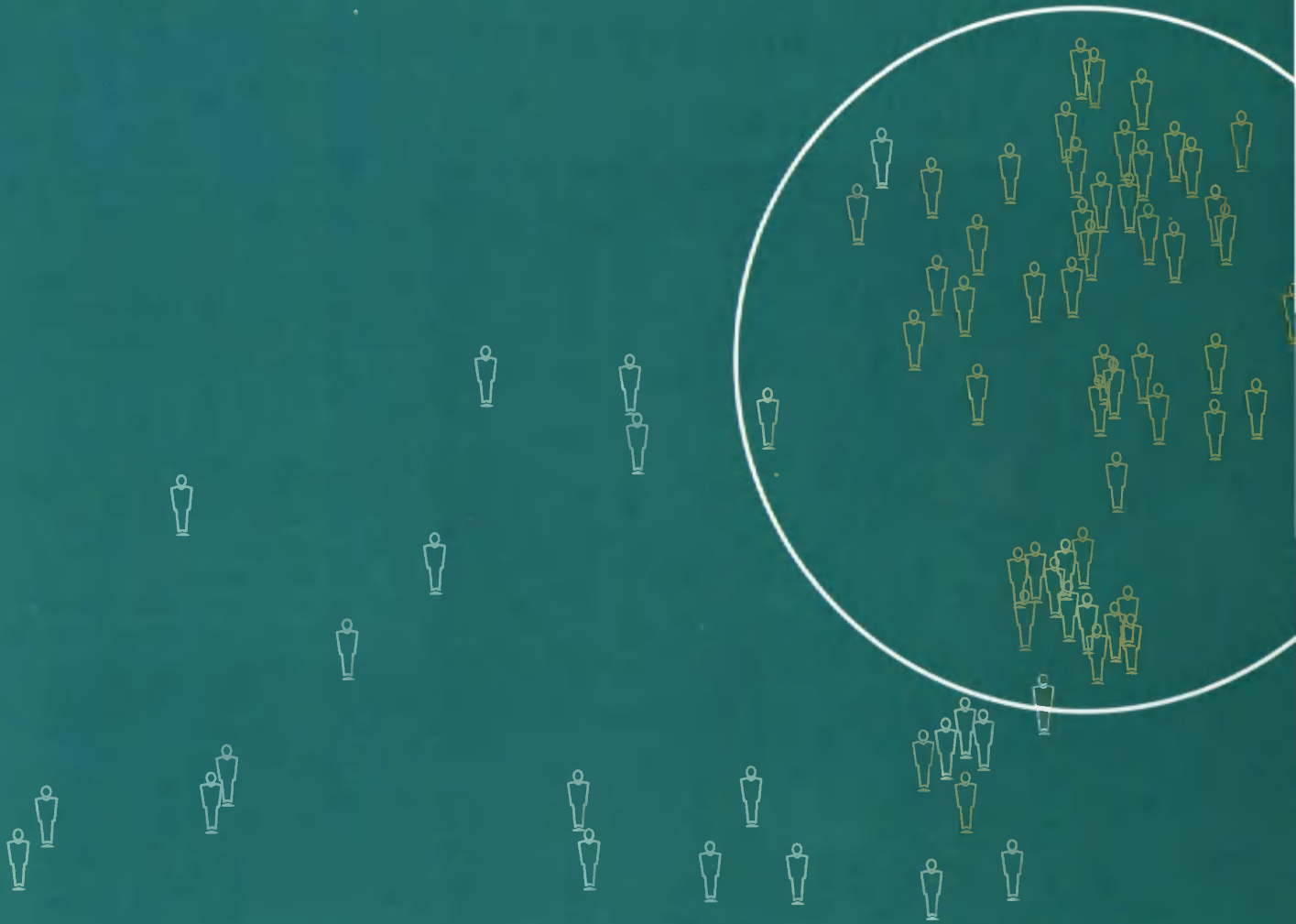
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# The road to success

*Transportation companies, large and small, are busy gathering market data*



Prior to deregulation in 1980, marketing was considered the stepchild of the transportation industry. You bought your rights to deliver goods from Point A to Point B. Rates were immaterial. Reliable transportation—that's all customers looked for. Today, people still want the basics. But they want faster service, lower rates, and statistical data to back up transit time. They want electronic data interchange of real-time information. The sophistication needed to market transportation services is probably tenfold over what it was ten years ago."

Those words, from Guy Denniston, senior vice president of sales and marketing with Daylight Transport, a Los Angeles-based motor carrier, neatly sum up the predicament faced by transportation companies. Twelve years ago, marketing—and especially marketing research—was virtually unnecessary and commonly nonexistent. Today, with profit margins shrinking and competition expanding, marketing research is a necessary weapon in the fight for survival.

So how are transportation companies coping with this need for marketing research? Surprisingly well. Transpor-



tation firms use a wide range of formal and informal market research techniques, from face-to-face information exchange to the most sophisticated uses of computer databases.

### Actively engaged

While the larger firms now have a wealth of market research tools at their disposal, their smaller counterparts are making do with smaller budgets and less sophisticated market research activities. Still, even these middle-market and smaller firms are actively engaged in research activities.

Right-O-Way Transportation, Inc. is a \$75 million dollar global freight forwarder based in Tustin, California. Right-O-Way offers everything from same-day domestic delivery to five- to seven-day service around the globe, by air and surface.

"Since deregulation, we are free to go

after any opportunity that exists to move shipments from Point A to Point B," says Rick Rowland, director of quality. "Second, third and fourth day delivery is our domestic niche, but we can get as creative with our services as we want to be."

And developing new and innovative transportation services is a primary goal of Right-O-Way's marketing research effort.

When the firm sought to explore customer surveys, a relatively new marketing research technique for the firm, Right-O-Way hired Just Marketing, a Scotts Valley, California-based firm that specializes in serving the transportation industry. They developed a written questionnaire, which was mailed to all current Right-O-Way customers.

The questionnaire asked Right-O-Way customers to list the types and quantities of products they had shipped

in the past and the types and quantities of products they had shipped in the past and the types and quantities of goods they planned to move in the future. The questionnaire also asked customers to comment on the quality of service they received from Right-O-Way.

The name and address of the customer was printed on each questionnaire. This way, Right-O-Way makes sure that a sales rep follows up with each respondent.

"From a quality standpoint, we meet with customers to find out how we can improve our service," says Rowland. "And if the survey shows that a customer's transportation needs are expanding or changing, our sales rep will try to gain that new business."

In addition, Right-O-Way uses a compilation of the survey information to

continued on p. 26



Daylight Transport's centralized customer service department, called the Customer Satisfaction Group, averages between 800 to 1000 calls a day from current and potential customers.

# Right on schedule

Nashville-based software developer TCS Management Group has an impressive list of customers that includes American Express, British Airways, Sears, Amtrak, and Citicorp. These companies, and dozens of others, use the company's software product, the TeleCenter System, to determine in advance exactly how many people should be on duty at any given time in their reservation center, order center, or customer service center.

Using a set of advanced mathematical models, the TeleCenter software automatically considers past incoming call patterns, special seasonal factors, and upcoming promotions to develop detailed hour-by-hour forecasts of future calling patterns and staffing needs. The program then prints detailed employee work schedules.

Use of the TCS software allows companies to have the right number of people on duty at any given hour of the day or night—and thereby optimize the delivery of good service to customers with the high costs of staffing their call center.

#### Users forum

In a time of corporate cut-

*A maker of work scheduling software uses a telephone survey to meet varied information needs*



TeleCenter System software helps companies predict how many incoming calls they are likely to receive on any given day. It also prints detailed work schedules so that the right number of staff are on duty to receive calls.

backs and economic downturn, TCS Management Group executives were not sure how many users of the TeleCenter software would pay their own way to fly to Nashville to attend the company's first-ever Users Forum, a special two-day educational event exclusively for TeleCenter System customers.

To be held at Nashville's Opryland Hotel, the forum would provide an opportunity to bring customers from around the world in contact with each other—and with the TCS Management Group staff. This kind of event, which is growing more common in the software world, requires lining up special speakers, preparing a series of detailed workshops and presentations, and making myriad arrangements to house, feed, and entertain the attendees.

While the company was underwriting the costs associated with planning the meeting and preparing the presentations, customers were responsible for paying a fee to attend and for their own travel expenses. Since it was the first event of its kind undertaken by the company, there was uncertainty over how many people would actually



come—and just what their concerns might be once they were present.

“Ten weeks before our scheduled meeting, we weren’t sure whether we would have 40 people or 140 people coming to Nashville for our Users Forum,” says Jim Gordon, CEO of TCS. “While we were relatively confident that most of our customers were happy with us and our software, we felt it was a critical time to find out for sure. If people had serious complaints or concerns, we wanted to know before they got up in a session with a hundred other customers and told them about it!

“In the past we had used our own staff to conduct satisfaction surveys among our customers, but we’d grown to a point where there wasn’t time to do our own survey and do it well.”

### Three objectives

Instead, TCS turned to an independent research firm, Nashville-based Prince Marketing, for assistance, Gordon says. “We wanted someone who could do the work quickly as well as objectively and professionally. When Dan Prince, president of Prince Marketing, assured me his firm could design, conduct, and interpret the survey in 21 days or less, I said, ‘Let’s do it!’”

Three objectives were set for the customer survey:

1. Update the TCS database of software customers,
2. Measure the level of satisfaction among software users and their managers,
3. Determine the likelihood of attendance at the upcoming Users Forum.

The first objective was required so that researchers would know they had

reached the right person and so that TCS could keep its records up to date for mailing its quarterly newsletter, special announcements, and sending out software updates.

The second objective was important in terms of surfacing concerns that particular users might have—and also in getting an overall reading on how customers were feeling about the software, the level of support provided to them, and the company behind the software. Accomplishing this objective would



Users Forum participants enjoyed dinner and entertainment aboard Opryland’s General Jackson Showboat on the Cumberland River in Nashville.

assist in product and promotional planning—both critical to the fast-changing, highly competitive industry of which TCS Management is a part.

### Many involved

A fact of business-to-business marketing for many companies is the reality that a number of people are involved in any major buying decision, such as

choosing to automate a previously manual function with a relatively expensive software-driven system. A solid reference from one manager to another can make—or break—a pending sale. Therefore, TCS executives felt it was important not only to gauge the satisfaction level among the day-to-day users of their software, but also among the individuals managing those users. Accordingly, the research team was instructed to interview both the primary user of the software and his/her manager at each company on the list.

The third objective was ultimately the stimulus to do the project sooner rather than later. It also meant trying to reach someone at virtually every organization that was using the software, rather than using a more traditional random sample approach. TCS staff needed to know how many people to plan for, as they were required to tell the hotel how many rooms and meals would be needed, and they wanted to make the event an unqualified success.

### Tight timeline

To meet the objectives—and the tight timeline—Prince Marketing opted for a telephone survey rather than a mail survey. Using TCS Management’s most current list of customers, interviewers were able to quickly reach the right individuals, easily redirecting the call in cases where the list was wrong or someone had changed responsibilities.

To keep the interview short and easy, respondents were asked to rate on a seven-point scale how easy it was to use the TeleCenter System software, how useful the reports and information provided by the system were, and how

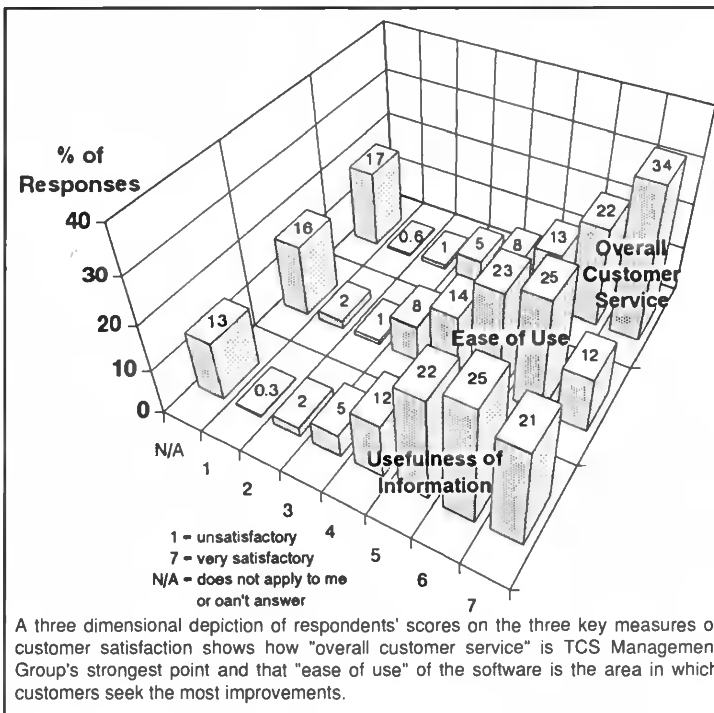
satisfied they were with the overall level of customer service they receive. In each case, comments and explanations were welcomed and noted.

Respondents were asked, "Would you recommend the TeleCenter System to a colleague?" and why or why not. They were also asked if they were aware that TCS Management Group was planning to hold a special users meeting to which they were invited, whether or not they or a representative of their company would be attending, and whether or not they would like additional information about the upcoming Users Forum.

According to TCS' Gordon, the Prince Marketing team accomplished the three

objectives and provided an added advantage to the company. As the inter-viewers learned the people's likelihood

company staff for immediate follow up. "I believe this step stimulated additional participation in our forum," Gordon says.



of attending the meeting and their interest in receiving additional information, the research firm faxed particulars to

service, usefulness of information, and ease of use (see chart).

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## Secrets of effective data use

by Rich Vondruska

*Rich Vondruska, Ph.D., is director of research & consulting at Dimension Research, Inc., Lisle, Illinois.*

It is difficult, but very rewarding, to distance ourselves occasionally from the day-to-day details of the marketing research profession, and to consider the “big” issues. Marketing research occupies a unique position between the more academic world of research, and the more practical world of business. In a sense, marketing researchers have a sort of “dual citizenship” in both worlds. Since the agendas of research and business are very different, it is sometimes problematic having allegiance to both worlds. In this context, the topic “data use” is a somewhat ambiguous topic. On the one hand, it acknowledges that, in the world of business, if DATA is not USEful, it is of little value. On the other hand, it implies that statistical and analytical tools can be employed to transform “raw DATA” into something that is USEful. However, usefulness is a judgmental term. It implies that “someone” determines that “something” is useful. Who is the “someone,” and what is the “something?”

### The nature of data

Before one can use data effectively, it helps to have a rudimentary grasp of the nature of data. In marketing research, we often think of data as the conglomeration of numbers obtained from a survey. Unlike mere numbers, however, data is inherently meaningful. It assumes meaning to the extent that it relates to an aspect of phenomenal reality. More colloquially put, phenomenal reality is “where the things of interest (phenomena) are happening.” In marketing research, that phenomenal reality is usually the marketplace.

Figure 1 illustrates my own viewpoint on how data should be construed. In Figure 1, phenomenal reality is represented

by the Oriental symbol of wholeness—Yin and Yang. For those unfamiliar with this symbol, a brief explanation is in order. The ancient Chinese believed that the world originated with two opposite yet complementary “forces.” Yin is

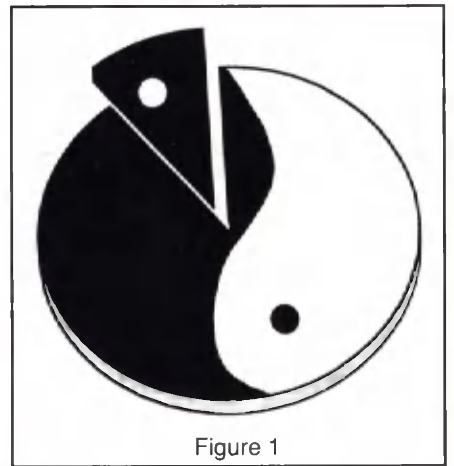


Figure 1

symbolized by the large black area of the symbol, and Yang

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by the large white area. Within each area, there is a small dot of the opposite color. This dot represents the interdependence of Yin and Yang, despite their separateness. These two "forces" also have connotative as well as denotative aspects. Yin is characterized as female, passive and dark. Yang is characterized as male, active and light.

What the Yin-Yang symbol is intended to reflect, for current purposes, is the idea that the many phenomena we investigate have a "completeness" that is resistant to an analysis designed to break it into components. Although dividing the whole is sometimes the only way to gain understanding, that whole must eventually be reconstituted in our theories about the phenomena. The significance of this viewpoint is not patently obvious if one construes data using only more traditional Western thought, which emphasizes componential aspects (e.g., computer flow charts).

The Yin-Yang symbol also captures the subtle complexity of the phenomena under investigation. It suggests a "harmony of opposites." If data reflected only chaos, there would be no reason to collect it in the first place. The "pie wedge" removed from the symbol represents the act of measurement to obtain data.

It should be made clear that we are not talking here about drawing a sample from a population of consumers. In sampling, we expect to obtain a representative group of respondents—a sort of microcosm of the population. Notice that what we obtain is not a microcosm of the symbol (i.e., a complete, but smaller Yin-Yang symbol), but rather incomplete information in the form of a piece of data.

For the purposes of the following discussion, any complex black and white figure could suffice. Here the "surplus meaning" of the Yin-Yang symbol merely enriches the process. Imagine that you did not know what the entire symbol looked like. You had only the piece of data. What could you conclude about the entire symbol? For one, you could conclude that it has both white and black areas. For another, you could conclude that it is possible to have a circle of white surrounded by black. You might also note the arc of the edge of the piece. Something you might be able to infer, but not necessarily conclude, is that the arc is part of a larger circle. Likewise, you might be able to conjecture that a small black circle might also exist.

By "slicing" things slightly differently the next time you collect data, you might get the black circle. Or, you might get a portion of the "S" shaped curve that divides the main regions of black and white. In other words, data can never give us the "full picture." We must use our mental faculties to interpret that data for it to become useful. A key point to be made here is that we sometimes concentrate on the piece of data rather than on how it fits into the whole.

Theories are developed to explain or account for phenomena. In any particular discipline, there is an implicit understanding of what "counts" as a phenomenon of interest. For example, the behavior of free-falling bodies would be considered appropriate for study by physicists, but not by marketing researchers. In marketing research, the primary phenomenon



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of study is purchase behavior.

The bane of marketing research is the theory-less "one-shot" study. Anyone who continually does one-shot studies is simply wasting ammunition. A one-shot marketer is trying to grab the proverbial gold ring on the carousel. A one-shot researcher is using skills and training in a mostly opportunistic way. Approached correctly, the field of marketing research can grow in sophistication to encompass issues bordering on a better understanding of human behavior itself. Approached poorly, it will never be more than a way for marketers to help protect their interests in risk-laden situations.

In this context, it should be noted that many of the activities related to marketing research are actually tangential to the purchase behavior per se. For example, advertisements are often tested to determine their effectiveness in communicating key ideas, but testing is not typically tied to the purchase behavior. Only in recent years, with the advent of scanner technology, has it even been feasible to ask whether or not advertising can produce a measurable effect on purchase behavior. There is no doubt, of course, that advertising (and other promotional activities) can help establish the preconditions for a particular purchase behavior (e.g., awareness of a new product).

#### Data in marketing research

From whatever angle one approaches the topic of "data

use," there are certain premises that are tacitly assumed. From the purely academic perspective, the major premise is that the "goal" of marketing research is an explanation of the dynamics of the marketplace. What is sought is understanding rather than knowledge about a specific situation. The practical applications of this understanding need not be immediate, but application ought to be within the realm of possibility. The academic perspective can be seen as a "long-term" one. The main reason it can be viewed so is that there is no reason to believe that the bases of consumer behavior will change radically over time. Specific products and services may change, but not the underlying principles governing behavior. In this vein, marketing research can be viewed as a special member of the family of behavioral sciences—special because of its direct ties to practical concerns. The cross-fertilization of the behavioral sciences over the years is evident to even the casual observer. Through this dynamic process, models of the marketplace are being molded, chiseled, and hewn into powerful conceptual frameworks.

From a business perspective, the major premise is that the goal of marketing research is to provide information for decision making. Marketing research, per se, holds no preeminent position in the array of information used to reach decisions. Obviously, the overriding goal for a decision maker is to seek good decisions and avoid bad decisions. This "short-term" perspective might be labeled hedonic empiricism. In this context, the "long-term" view is precluded by

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the immediacy of the need for information.

It must not be concluded, however, that either of these two very different perspectives is the "superior" one. Both perspectives have adaptive advantages, as well as attendant dangers. "Long-term" academic researchers are often criticized for being out of touch with the realities of the marketplace (the "ivory tower" criticism). "Short-term" marketers are often accused of doing research that is motivated by the fear of being judged solely responsible for a "bad" intuitive decision. They are merely seeking a place to "point a finger" if the consequences of their decisions don't pan out as expected. With apologies to comedian Flip Wilson, it is as though they want to be able to say, "The research made me do it!"

### Synergistic relationships

It is often overlooked that most marketing research situations are of the form of a synergistic relationship between researcher and marketer. In this sense, marketing research is not "done" in the sense that a statistical analysis is "done." Rather, marketing research emerges as a joint function of the needs of the marketer and the skills of the researcher. One might argue that marketing research is more of a transition than a product or service. To the extent that marketers see research as a product, they will de-emphasize the understanding that can be gained. To the extent that researchers see marketing as a service, they will de-emphasize the important role it has in the non-academic world. The optimal situation is a dialogue between marketer and researcher that ensures mutually satisfactory transactions.

Without such dialogue, the analysis of a data set is often divorced from the original questions the survey was intended to address. From an objective standpoint, any statistical textbook could be consulted to determine the "proper" analysis. But the main questions might not be addressed even in the objectively "proper" analysis. "Proper" data is not necessarily useful data. Since the design of the survey and analysis of the data are inevitably interwoven, this dialogue between marketer and researcher should precede questionnaire development.

There can be no "magical" statistical solutions if the prior steps have not insured that the "proper" analyses can be performed. Worsening the situation is the widespread availability of statistical software. This encourages untrained individuals to apply statistical tests in an indiscriminate manner. The expectations generated in the minds of the owners of these statistical packages are oftentimes unrealistic. Owning a "statistical cookbook" does not make a person a "chef." And not even the greatest chef can make chocolate mousse from headcheese.

It is a lucky marketer who works with a researcher who is aware of the validity, and business necessity, of the "short-term" view. And it is an equally lucky researcher whose client appreciates that the "long-term" view can pay dividends in the future. Working together, this "team" of the marketer and researcher can address any challenge offered by the market-

place. They will not only find opportunities with a "long-term" view, but also will seize opportunities by dealing with "short-term" competitive threats with information rather than emotion.

Fueled by imagination and insight, the contribution of both marketers and researchers should lead to those "competitive advantages" that are so sought after in the world of business. So how does one go about finding such "gems" in the data? In some sense, what we seek is information rather than insight, but I would contend that the two go together more often than not.

Broad generalizations contribute little, and preoccupation

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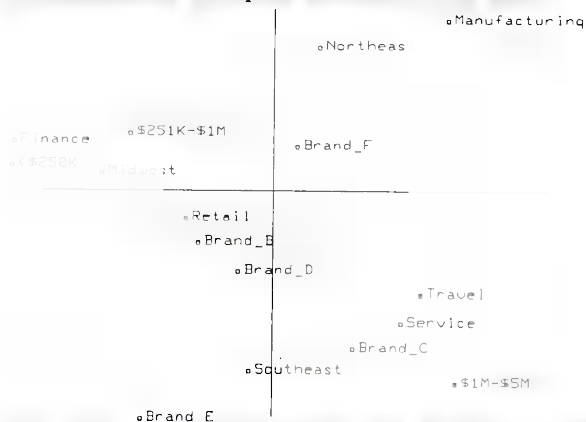
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# Surviving the competitive warfare

by Arup K. Sen

*Editor's note: Arup K. Sen is president of Marketing Decisions Group, Inc., Clarence, New York.*

"War belongs to the province of business competition, which is also a conflict of human interest and activities."

—Karl von Clausewitz

**K**arl von Clausewitz, a great Prussian general, wrote a book entitled "On War" which describes the strategic principles behind most successful wars. The key point in his book was that two ingredients are necessary to be successful in a war: strategy and tactics. To survive the intensely competitive environment of the '90s, firms must be cognizant of not only their own strategies and tactics but also those of their competitors.

Marketing today for a company is not just being customer-oriented, it is being competitor-oriented as well. Firms must assess the strengths and weaknesses of their competitors, develop their strategies and tactics based on that information and then launch their marketing attack. In short, marketing is the war where the enemy is the competition and your success is determined by the number of customers you win over.

The fierce competition engendered by the limits on corporate growth is forcing organizations into aggressive new postures. The victory belongs to the side that does a better job of marketing research. Every organization should know how it compares with its competitors with regard to its overall image, its

specific brands and the products it offers to the marketplace. If a company can determine its position in this complex and competitive environment, it can target its advertising, marketing, and product strategies more accurately and effectively, thus using a rifle approach rather than a shotgun approach.

Continued monitoring of the progress over time is essential to measure the effectiveness of these strategies and to signal any necessity to regroup. Several research techniques and analytic procedures exist to arm an organization with self evaluation and competitive intelligence.

The research procedures discussed in this article apply to both business-to-business market research as well as consumer market research. The particular issues and attributes will differ based on the needs of the organization, but the primary objectives of the research should be to identify the position of the company and its products as well as the competitors in the market place.

Unfortunately, knowing the positions which various competitive alternatives have in the market does not necessarily explain purchase preference or product success. It is necessary to also evaluate the relative consumer importance placed on all key product or service attributes.

This research plan is very actionable, systematic, and is designed to communicate results effectively. In order to accomplish the objectives as discussed, this analysis will proceed as follows:

1. First and foremost it is imperative

that the number of attributes be reduced to a manageable size so that brands, products, and companies can be evaluated more exactly and with greater understanding.

2. Next, the extent to which these dimensions are important to the overall image of each brand, product, and company, must be determined.

3. Finally, a graphical display of the competitive environment of these dimensions is sought.

A brief description of each step of the complete analysis is as follows:

## I. Factor analysis

While factor analysis in marketing research has been around since the 1940s, the advent of the computer has made the extensive computations easy to carry out and the methodology more practical to use.

The objective of factor analysis is to examine the commonality across the various rating scales and the attributes used in such a rating process. This is accomplished by:

—reducing the existing set of attributes to a manageable size, e.g., three factors rather than 15 attributes, and

—comparing the existing brands and products in question with the ideal on each of the factors.

This process allows for a new set of variables which is easier to work with and perhaps even easier to understand.

continued on p. 34

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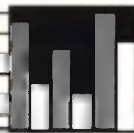
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## Air bags are accepted despite lingering questions

Consumer awareness and acceptance of air bags in automobiles has increased significantly over the past few years, yet many Americans remain nervous about their technological safety, according to a nationwide survey on auto safety in America. The survey, conducted for Prevention magazine and General Motors by Louis Harris and Associates, found that 44 percent of American adults would pay an extra \$500 for a car equipped with an air bag, compared to only 29% in 1990.

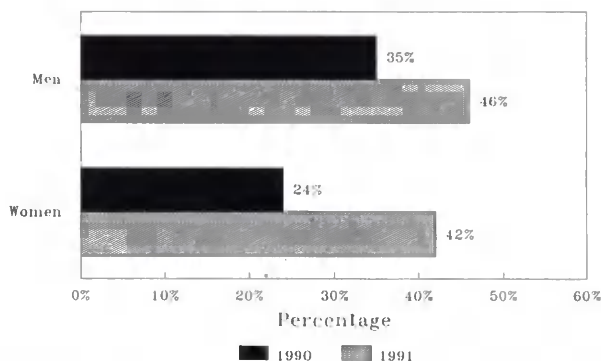
However, despite their willingness to pay more for the safety device, a large number of Americans questions, 38%, think that accidental air bag inflation is

a serious problem. A significant proportion of consumers (35%) also believe that air bags can trap an individual in his or her car when inflated. In addition, while two-thirds of adults believe air bags provide better protection in a

crash than seat belts alone, twenty percent of individuals mistakenly think air bags will take the place of seat belts.

"Despite the enormous efforts to educate consumers about the safety of air bags, and the key role these devices can

People willing to pay extra for air bags  
By sex, 1990-1991



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play in saving lives, many individuals still perceive them as dangerous," says Richard Porter, publisher of Prevention. "The proven safety value of air bags must be reinforced with the consumer."

The survey found that consumers have responded to the use of other safety measures in cars such as wearing seat belts. According to the study, sixty-five percent of adults now say they always buckle up in the front seat of a car, up 46 points over 1984, when just 19 percent said they always wore seat belts.

Americans are also strongly in favor of laws mandating seat belt usage. Of those adults questioned, four out of five (80%) support mandatory seat belt laws, including 68% of those living in states without such laws.

continued on p. 36

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# NAMES OF NOTE

**Darryl Goldberg** has been named associate director of research at *Johnston, Zabor & Associates*, a marketing and communications research firm in Research Triangle Park, NC. In addition, **Matthew Mercurio** has joined the firm as research supervisor.

**Joyce Caldwell** has been named data collection director at *Quality On Time Interviewing*, Lenexa, KS.

**Michael Halberstam** has been appointed president of *Interviewing Service of America*, Van Nuys, CA.

**Barbara McIntyre-Ross** has been promoted to account manager, client service at *NFO Research, Inc.*, Toledo, OH.



McIntyre-Ross

Hemker

**Ruth Hemker** has joined Minneapolis-based *Leon Tyler Marketing Research, Inc.* in client services. Previously she was research director for First Bank Systems.

Fort Lee, NJ-based *Sigma Validation* has been endorsed by the Board of the Qualitative Research Consultants Association as one way to identify problem respondents.

**Jim Ploog** has joined *Chamberlain*

*Research Consultants*, Madison, WI, as statistical analyst.

**Pat Dougherty** has been named manager, market research at *Meadox Medicals*, Oakland, NJ.

**Alan Seraita** has been promoted to senior vice president, director of magazines, at the Syndicated Studies division of **Simmons MRB**.

**Will Gordon** has been named principal, *Decision Research*, San Francisco.

**Frank Girardi Jr.** has been named

vice president, professional services, *Genesys Software Systems Inc.*

**Toni Shields** has been named vice president, marketing and client service at *BAI*, a Tarrytown, NY-based research and consulting firm. In addition, **Bob Skolnich** has been named executive vice president.

**Nicholas Mannino** has been named senior account executive at *VF Information Service*, Langhorne, PA.

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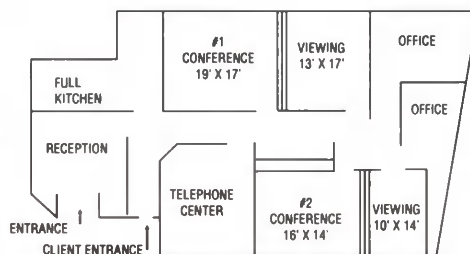
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**TMR, Inc.** has opened a telephone market research facility in Parsippany, NJ. The facility will conduct domestic and international telephone surveys on consumer and business products and services using CATI software. Joe Calvanelli will head up the operation. The facility is located at Two Sylvan Way, Parsippany, NJ, 07054. Phone 201-829-1030.

survey company based in Ann Arbor, Michigan, has moved into larger offices at 3975 Research Park Drive, Ann Arbor, MI, 48108. The company specializes in large-scale surveys and in the collection of telephone interview and mail survey data. Contact Sherry Marcy at 313-994-0540 x144 for more information.

the facilities presently available in the Bala Cynwyd, PA office. The new facility will be managed by Debbie Rosenthal, formerly with Shugoll Research. For more information, contact Merle Holman at 215-668-8535.

Due to business growth and an increase in new customers, **DataStat, Inc.**, a public opinion and market research

**Group Dynamics In Focus, Inc.** has opened a new focus group facility in New Jersey. The new facility, known as Group Dynamics/Cherry Hill, expands

Atlanta-based **Superior Research** will open a new focus group facility in the Tampa, Florida area in May. For more information, call Rhoda Davis or Debbie Hunter at 404-394-4400.

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 Review



## New version of Compass available

A new version of Compass marketing software has been released by Claritas/NPDC. Compass allows users to integrate, analyze, and map small-area demographics, PRIZM lifestyle segmentation, media databases, product-usage data, street mapping files, any of 60 specialized databases, and their own customer or prospect data. It runs customized or pre-designed reports and maps for strategic planning, site location, media planning, direct mail, sales planning, and other consumer marketing functions.

The new Compass 5.0 offers a simplified menu and pre-designed applications that follow the logic of precision marketing. The menu is organized by four key marketing questions:

- Who are my targets?
- What are they like?
- Where can I find them?
- How can I reach them?

Compass 5.0 also runs a number of reports and maps faster, provides map exporting to other software packages in Hewlett Packard Graphics Language (HPGL) format, and provides batch processing to create and store reports or maps for batched printing later. It is available with complete street mapping, using the TIGER files from the Bureau of the Census. Polygon definition and finer zoom capabilities allow for greater precision in map and area definition.

By mid-year 1992, Compass 5.0 will provide pay-as-you-go access to additional databases via modem including

specialized data for retail sales potential, health care data, Yellow Pages directory areas, and crime data. These databases are maintained on MAX 3D, Claritas/NPDC's on-line marketing system. For a free demo diskette, call 800-876-6732.

## Reference hook compiles private companies and their affiliations

Numerical coding of corporate affiliations, a larger size and new format, a new name, CD-ROM and online availability, and first-time listings for more than 800 companies are the biggest changes in the 1992 edition of the Di-

rectory of Leading Private Companies, including Corporate Affiliations, published by National Register Publishing Company (NRPC). The Directory is a business and professional reference source that provides in-depth information about major privately owned companies and their subsidiaries, divisions and affiliates. The 1992 edition introduces a simple numerical order format that shows, at a glance, not just the existence of subsidiary companies, but the exact relationship of each operating unit to other units, and to the parent company. The 1992 edition contains listings for over 7,000 parent companies and their more than 15,000 subsidiaries. Beginning in April, the Directory

continued on p. 40

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# The case for a control cell

by Norman Frendberg

*Editor's note: Norman Frendberg is president of Consumer Insights, Rochester, New York.*

**C**reating a research design that accurately addresses the marketing issues at hand represents an important and challenging role for the research professional. This challenge is further enhanced by the wide variety of appropriate alternative research designs available for virtually every marketing issue. In some cases, the difficulty increases when marketing management specifically requests a particular design which may be considered less than optimal.

For instance, a marketing manager may ask the researcher for help in understanding the causes of a specific consumer behavior by conducting a survey only among a particular population. For example:

- Interview consumers who responded to a promotion in an attempt to understand its success/failure.
- Interview heavy users of a product to understand what drives their consumption.
- Interview consumers after trial of a new product formulation to determine acceptance/rejection of the product.

## **One-shot studies**

The above examples use a design which is often referred to as "one-shot studies," involving the collection of data from only one sample group of respondents.

This design may be appealing because of its simplicity and low cost, but it lacks a control cell for comparison of the key measures. Subsequently, such

an approach may yield very little insight about the behavior under study.

For example, the maker of a major brand of ground coffee wants to determine consumer acceptance of a new formulation (i.e., the mixture of Columbian, African, and Asian coffee beans). Let's assume that marketing management directs a one-shot study by testing the product with a sample of consumers. Furthermore, the findings indicate that 60% of the respondents rated that product "excellent" overall.

The following key question still remains unanswered: are consumers positive to this new coffee?

By restricting the sample population, we have not determined if consumers are positive or negative to this new coffee mixture. In order to accomplish this, we must compare the 60% "excellent" new product rating to a relevant control cell product, which might be the current mixture.

## **Popular desigus**

A product test which easily incorpo-

rates an overall rating measure with a control product can be executed in several ways. The two most popular designs are the monadic and the protomonadic.

In the monadic design, two equivalent but different respondent samples are interviewed. Each respondent tests either the control product (i.e., current) or the new formulation test product, but not both.

The protomonadic design involves interviewing only one set of respondents, with each respondent testing both the control product and the new formulation test product, but in a sequential format. The first product is tested and evaluated, followed by the testing and evaluation of the second product. (In practice, half of the respondents test the new formulation product first with the current second, while the other half of the sample tests the products in reverse order. This rotation eliminates any order bias, i.e., preference for the first product tested, regardless of which one.)

Both research methods are very strong

designs since the scores for both the test and control products are attributed to the actual product differences.

Let's refer back to our hypothetical example where 60% of the respondents rated the test product as "excellent." The examples at right illustrate two different control cell results which would totally alter our conclusions.

Although the situations may be extreme, they exemplify two vastly different conclusions with the same post-only results (i.e., 60% "excellent" rating).

The control cell design is regularly used for the type of product testing described above. However, some research projects without a lengthy history or an acceptable method of product testing may lack a control cell. Regardless of acceptability, a control cell is just as important when conducting a promotion test because without this control

continued on p. 35

### *Situation 1*

**Control (current)  
Product Measure**

**Test Product**

60% excellent

60% excellent

**Conclusion:** The test product is at parity with the current. If the new formulation is less expensive to produce, then it should be introduced.

### *Situation 2*

**Control (current)  
Product Measure**

**Test Product**

80% excellent

60% excellent

**Conclusion:** The test product fails to exceed the current and should, in most cases, be eliminated from consideration.

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## Transportation

continued from p. 7

develop its overall marketing plans. It analyzes overall trends in its customer base and identifies customer needs by geographic region and city. Right-O-Way then develops packages of transportation services to meet those needs.

"We have a broad menu of services to offer," says Rowland. "Marketing research enables us to home in on what specific customer groups need today

and tomorrow."

### Transborder business

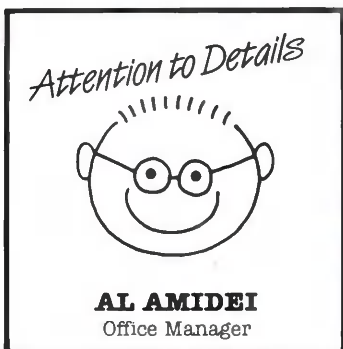
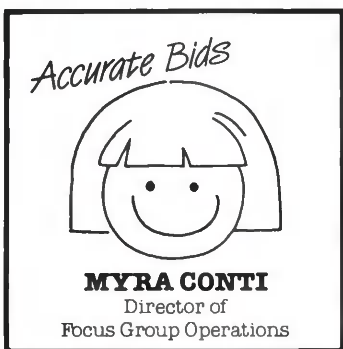
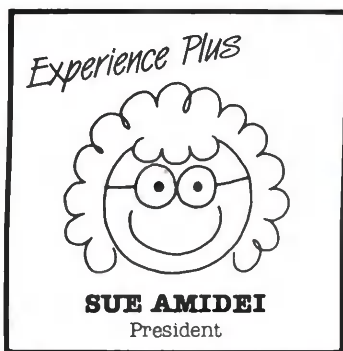
Right-O-Way is heavily committed to international shipping, especially transborder business with Canada. Therefore, much of its marketing research effort reaches outside U.S. borders.

Rowland was manager of Right-O-Way's transborder services in 1985 when the U.S.-Canada Free Trade Agreement (FTA) was passed. Basi-

cally, the FTA specifies three schedules for phasing out tariffs and duties over a ten year period starting in 1989. By studying the FTA and communicating directly with Canadian and U.S. government officials, Rowland and his staff found out which industries and product markets would open up first.

"We identified what types of products would be moving across the border and determined how best to tap those markets," says Rowland. "Our FTA research showed that, initially, there would be a great deal of movement of electronics and computers from the Midwest into the Toronto area. So we identified which companies on both sides of the

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border were most likely to engage in this trade. We went aggressively after those accounts, developing transportation services to match their needs."

Rowland admits that Right-O-Way had a distinct advantage when tapping the transborder market. "Our sister company, Right-O-Way Canada, has offices in every major Canadian airport city. We've been able to coordinate marketing research on both ends and come up with programs that take advantage of everything we know north of the border."

Domestically, Right-O-Way taps a wealth of external sources for research and sales purposes. The company pur-



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#### Mail and telephone

Jean McClymonds, president of Just Marketing, also serves as the research chairperson for the Sales and Marketing Council of the American Trucking Association. When transportation firms are looking for basic trends in customers' shipping preferences, they will more than likely use mail surveys or telephone interviewing as their research tools, McClymonds says.

"One of my larger clients sends out an annual survey to approximately 20,000

businesses, customers and non-customers alike. It asks respondents to rate the major carriers on a number of service criteria and to indicate the importance of various transportation factors such as price, dependability, on-time performance and so on.

"It's a blind survey in the sense that they don't tell respondents who's conducting the survey. The survey goes out under the name of a market research company, but they collect the data and do the analysis."

Transportation firms find such surveys very revealing, McClymonds says. "They learn a lot about their reputation as well as the perceived value of current services and prospective new services."

For smaller, more specific research efforts, the firms often switch from the mail to the telephone. "Generally speaking, these telephone interviews can be completed in a matter of minutes," McClymonds says. "And companies can discover some very valuable information about specific aspects of their market and/or services."

#### In-house databases

To obtain names for their mail and telephone surveys, most transportation firms use their own in-house databases, augmenting them with subscriber lists from major trade publications or list brokers with an emphasis on the transportation and purchasing industries. They generally select names from across various standard industrial classifications (SIC), sorting by size of company, number of employees, or geographically, depending upon the survey's objectives.

In addition, today many of the transportation companies conduct smaller surveys of their current customers, both by phone and mail. In some cases, these surveys will be very sophisticated. In others, they're much more informal.

Sometimes, a customer survey will serve as one part of a larger market research project, McClymonds says. Several years ago, for example, a client conducted a survey regarding the strengths and weaknesses of its customer service department. It surveyed both customers and employees, and held

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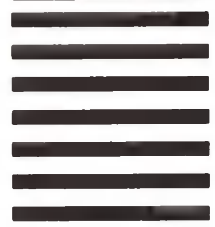
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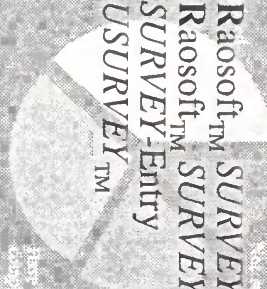
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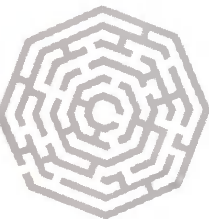
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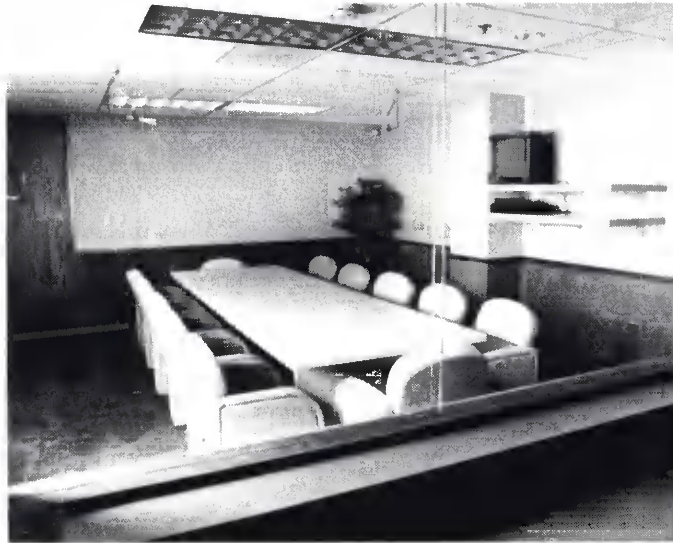
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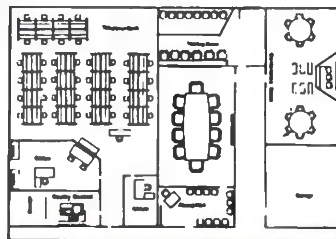
**Annie Sampegna-Reid and Chris Balthaser** manage The Research Center. They have over twenty years combined experience recruiting focus groups and central location tests in the Denver market. Their goal is to provide clients with the highest quality recruiting and the best facilities in Denver.



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focus group sessions at its shipping terminals.

In addition to surveying current customers, transportation firms will survey departing accounts to determine why they lost their business. "Many companies will conduct a telephone survey of lost business. Basically they'll ask, 'Why did you leave us?' In many cases, the customer might have had a decline in business due to the recession, or they went out of business altogether. And in others, it may have been due to unsatis-

factory service. We believe it's the latter that clients should pay particular attention to."

### The competition

When researching the competition, some companies obtain the publicly published financial records of other major transportation carriers. However, most firms agree that the best source of competitive information is their own sales force.

"Salespeople talk to customers every

day," says McClymonds. "They hear things and they feed it back. Companies can synthesize that data and get a sense of what's going on. But you have to be careful, because there are laws that limit what kind of contacts you can have with customers and what type of information you can get from them."

One client takes its competitive information gathering very seriously, keeping extensive files on its major rivals, McClymonds says. Each of those files is assigned to an account manager, who becomes the in-house specialist on that particular carrier.

"Everyone gathers information and forwards it to the appropriate specialist," says McClymonds. "The file is updated every six months. Those files are condensed into competitor fact sheets, which are put into a three-ring binder and made available to anyone in the marketing or sales departments."

At some companies, market researchers are free to examine the wealth of operational data kept in internal databases. "This data can help a company identify its major customers or major shipping lanes. Through computer overlay programs, they are able to access shipment activity and spot trends that are very telling."

### New markets

Transportation firms also use their databases to help identify new markets. By tapping external and internal databases, they can look at the demographics and business activity of territories they're not serving and make an accurate determination of whether it makes sense to open a terminal in that locale. "When a company is considering a new territory, it should look at trends in population, retail sales, and number of businesses over a six-, nine-, and twelve-month period."

One major transportation firm uses its own "interline activity reports" to gauge whether new markets should be entered. "When a transportation firm handles a shipment and the final destination is outside its own service area, it will hand the shipment off to another carrier. If you track this activity closely and see that you're turning a lot of



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business over to another carrier in a particular area, you should consider moving in."

McClymonds says that many larger firms now subscribe to general commercial databases such as Trinet, which covers various industries by SIC codes. It helps them profile communities and subsequently provides actual leads for their salespeople.

Others are using more transportation-specific databases such as TranSearch, a freight flow database. It models movement between various points throughout the U.S., estimating tonnage by SIC code for commodities moving within certain lanes.

"Let's say you want to examine shipping activity between Salt Lake City and Portland. TranSearch will give you the major commodities, listed in descending order. And, it gives you names of companies involved in those industries."

#### Well-defined niche

Daylight Transport, a \$40 million a

year less-than-truckload (LTL) carrier of motor freight, has carved itself a well-defined niche in the transportation industry. Daylight specializes in expedited over-the-road delivery, coast-to-coast and Texas. It delivers faster than most surface carriers with a rate structure that is less expensive than air freight.

search techniques are best described as informal, but Denniston is planning to incorporate more formal research techniques in the immediate future. "We're in the process of developing a detailed mail survey that we hope to introduce in the second quarter of '92. We're also planing quarterly focus groups and

*"This data can help a company identify its major customers or major shipping lanes. Through computer overlay programs, they are able to access shipment activity and spot trends that are very telling."*

"Most of our competitors take six or seven days to the East Coast, we do it in four," says Daylight's Guy Denniston. "That's our little niche, so the markets we go after are the ones where we can shave off coast-to-coast transit time."

To date, Daylight's marketing re-

roundtable discussions with key customers. We'll tell them where we're heading and ask them what they need and how we can better serve them."

The task of Daylight's current marketing research effort is to cost-effectively identify industries and compa-

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nies that can take advantage of its unique services. "We're not a hundred million dollar company that has a lot of money to spend on outside market research and fancy databases. Ours is a roll-up-your-sleeves-and-do-the-basics kind of com-

welfare, but I don't think they realize that we're using this information for marketing planning purposes."

Another source of information is the company's Customer Satisfaction Group, a centralized customer service

step further, refine it, and offer something better."

Denniston is also an avid reader of transportation industry trade journals, as well as specific customer trade journals. "I'm looking for trends. I'll analyze the shoe industry or maybe the textile industry, looking for changes in their distribution patterns or transportation needs. Then we'll move to fill that new niche, staying ahead of the competition. We have a lot of flexibility because of our small size and flat organizational structure."

#### Looking forward

The transportation industry's continuing investment in marketing research is testament to the importance the leading transportation companies place on such information gathering techniques. And although smaller carriers might not have the extensive resources to devote to this activity, they nevertheless recognize its importance.

Rick Rowland feels that Right-O-Way has gone a long way to improving its marketing research function since the industry was deregulated. However, he says that increased competition and a growing emphasis on global trade requires him to be on the lookout for new sources of marketing information.

"In the freight forwarding industry, you have to be flexible or you're not going to exist. Marketing research is critical to gathering information about political and geopolitical developments in the United States, Canada, and Europe. We've grown dramatically internationally and the bulk of our growth in the next two to five years will be in international business."

Daylight's Guy Denniston also has no misconceptions about the competitive nature of the transportation industry and Daylight's need to keep up in the area of marketing research. "We're a small fish in big pond. To survive, we can't just meet the customer's expectations, we have to exceed them. Through marketing research, we have to find the little angle or niche where we can exceed the expectations of the customer. And we have to differentiate ourselves from the competition." □

*"In the freight forwarding industry, you have to be flexible or you're not going to exist. Marketing research is critical to gathering information about political and geopolitical developments in the United States, Canada, and Europe."*

pany," says Denniston.

Thus, Daylight's primary method of market research is talking face-to-face with customers. Denniston and the rest of the firm's sales and marketing management team spend substantial time in the field with sales reps, talking to customers and gathering information. "Our customers see our concern for their

department. It averages 800 to 1000 calls a day from customers and potential customers, handling requests, answering questions and resolving complaints. Once a week, the group meets with marketing representatives to share information. "They tell us what type of calls they're getting, what problems are coming up, and what customers are asking for. They keep us tuned to the problems and service requests they receive," Denniston says.

The firm pays close attention to the service requests from prospective clients. "We may discover that something we aren't offering is keeping us from getting more accounts. Recently, one prospect asked if we had electronic billing, something akin to money transfer. We're not quite set up to do that yet, so we lost that account. That's a hurdle we have to overcome, something to look at in the future."

In addition to gathering marketing research on customers, Daylight gathers competitive information. Denniston feels its important to see what the competition is doing and to determine how Daylight can do it better. Again, the sales force is the primary source of information.

"Customers are open with that type of information. If a competitor comes out with a new product or service, they'll tell us. Then we'll try to take that idea a

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Review

## Schedule

continued from p. 10

"It was flattering to learn that 34% of those surveyed gave us the highest possible rating for customer service (a 7 on a 7 point scale) and to hear comments like, 'terrific service' or 'very responsive.' Still, we were very interested in suggestions for improvement, such as shorter response time and longer operating hours for our telephone support staff.

Customers often come in on Saturday, for example, when their office is quiet, and use our software to consider possible scenarios and develop new employee staffing plans. They want to be able to reach one of our people when they have a specific question about how to best do something. They don't want to have to wait until Monday, when they'll be busy with other things," Gordon says.

"These are the issues we're addressing now. We have redeployed some of our people, expanded Saturday coverage, and instituted a beeper system to increase our responsiveness."

The company prides itself on the level of after-sale support it offers to its customers—and views these new initiatives as part of its commitment to improve the way it serves them.

### Users receptive

"Ease of use" received the lowest scores relative to two other key measures of customer satisfaction, with 60% of respondents providing a ranking of 5, 6, or 7. These scores and the verbatim comments on ease of use parallel comments heard through other sources, Gordon says, and dovetail with current software development priorities. "Users were extraordinarily receptive to the enhancements and changes we introduced during our Users Forum," he says.

Eighty-four percent said they would recommend the TCS system to colleagues. No one said they would not recommend the system. The 16% who declined to answer did so primarily because they said they were new to the software or to their job. Company officials were extremely pleased with the results of this question, since it provides further that evidence the company is doing what it needs to do to satisfy its

current base of customers—and that it can now use this information to attract new ones.

### 2 + 2 > 4

Looking back on the research, Gordon says: "This was one of the rare times when two plus two really did add up to more than four. Doing the research in the way we did, at the time we did, gave us a good indication of likely attendance, identified areas of strength and priorities for improvements, and showed our customers we care enough

to listen.

"We pride ourselves on being a customer-driven, not technology-driven, company. The positive feedback created tremendous esprit de corps for the whole staff. At the same time, you can't deal with problems and concerns if you don't know about them. We were able to identify these concerns ahead of our national meeting and develop appropriate responses. All in all, the survey told us we're on the right track—and that alone justified our investment in the research." □

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## Competitive Warfare

continued from p. 16

For example, you may find out that consumers really use only three basic dimensions to evaluate your company, brand or products. These may be such broad factors as customer service, price/value relationship, and company reputation.

Using factor analysis you will discover that the 15 or 20 attributes in the original data have overlapping meanings and that they reduce to three or four underlying fundamental dimensions.

### II. Multiple regression analysis

The purpose of this statistical procedure is to identify how well the attributes of each brand and product, as well as the ideal, predict and/or affect the overall competitive position. Furthermore, this analysis ranks the importance of each of these factors in the prediction of overall brand and product.

The primary function of the multiple regression technique is to be able to profile each of the major brands or products and the extent to which those di-

mensions, both individually and in combination, affect its overall position in the market. In addition, it identifies which dimensions are uniquely important in describing each particular brand or product.

Let's look at three factors: customer service, price/value relationship, and company reputation. Applying this technique, we could determine that price/value relationship is considered most important among the three factors as well as the degree of its importance. This information helps in formulating the marketing strategy and advertising message.

### III. Perceptual mapping

Perceptual mapping is another step in this overall analysis which will further simplify this task by taking consumer judgments of overall similarity or preference and converting these results into easy-to-interpret spatial maps. This technique will show the spatial relationships among the brands, companies and products on major dimensions identified as important.

Perceptual mapping is a technique

for visually portraying consumer perceptions of competitive brands. By consolidating data on brand perceptions in a two-dimensional space, perceptual mapping allows for:

—Identification of the cluster of brands that are perceived to be similar/competitive versus dissimilar/non-competitive.

—Identification of perceived strengths and weaknesses of a particular brand compared with the competition.

Based on this comparative analysis, marketing strategies can be developed to enable:

A) Repositioning of a brand based on an assessment of the opportunities and vulnerabilities of the current position and

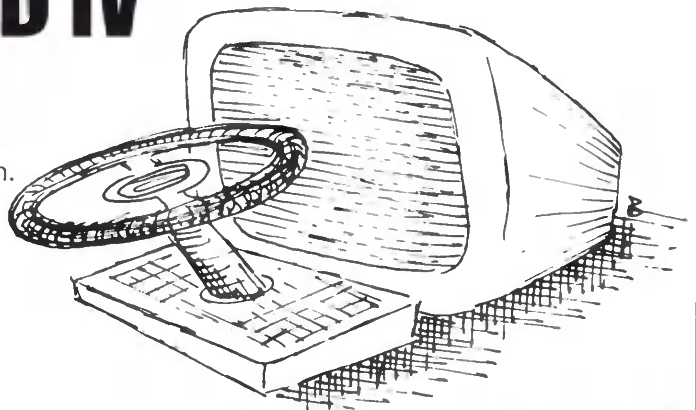
B) Identifying new product opportunities based on any evident "gaps" in the current marketplace.

With this series of statistical techniques the researcher is armed with ammunition to predict product, brand, company position and to model the market for new and/or repositioned products. □

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## Control Cell

continued from p. 25

group for comparison, we fail to have sufficient data to provide accurate assessment of the promotion.

### Stairstep to disaster

Selecting an appropriate control product is not always as straightforward as using the current formulation. Let's assume that marketing management continues to reduce the cost of the coffee product formulation (e.g., adding inferior coffee beans at the expense of superior ones). If we continue to use each subsequent "current" product, i.e., already cost-reduced, as the control cell, then we could experience a phenom-

---

*While product testing of the "current" versus the "cost reduction formulation" is appropriate to test one new formula, some control is needed to avoid this stairstep to disaster when many new cost reduction formulas are involved.*

---

enon known as the "stairstep to disaster."

The "stairstep to disaster" process occurs because each new product formulation is only slightly inferior, which fails to be significantly less preferred than the current product. However, if several small degradation steps are taken, the resulting product (i.e., at the bottom of the stairstep) can be quite inferior to the original formulation.

While product testing of the "current" versus the "cost reduction formulation" is appropriate to test one new formula, some control is needed to avoid this stairstep to disaster when many new cost reduction formulas are involved. Several approaches exist for creating an appropriate control product

to be used to test the latest cost reduction formulation. One method entails the creation of an original formula to test against each new cost reduction formula, rather than testing the new product against its predecessor. Another approach involves testing the new cost reduction formula versus one or two competitors in the category who deliver similar overall benefits to the consumer.

### Summary

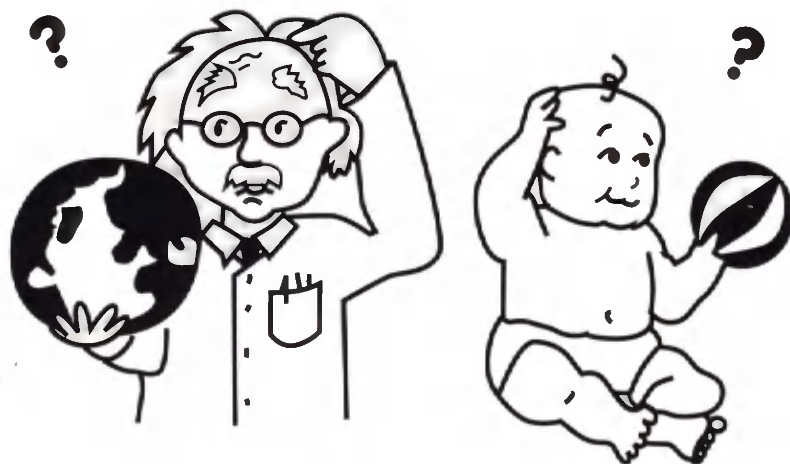
In brief, a control cell product is

needed in order to answer absolute questions that marketing management often requires such as "How good is this new product or promotion?"

Without a control cell, we cannot convert our survey answers (i.e., 60% "excellent") to insights about consumer acceptance of our product.

The selected study design must be able to answer the key questions asked:

- What have I really learned?
- How conclusive is the evidence?



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## Survey Monitor

continued from p. 18

### Popularity of athletic shoes keeps rising

Almost three out of four Americans aged 13-75 (72 percent) bought athletic footwear in 1991, compared to 67 percent in 1988, according to a new national survey conducted by the Athletic Footwear Association (AFA). The percent of the population that wear athletic footwear declined over the same period from 87 to 84 percent, the survey found.

The popularity of athletic footwear, however, continued to climb among those who wear them:

- The average number of pairs owned by wearers rose from 2.7 in 1988 to 2.9 in 1991.
- The percent of wearers who own four or more pairs climbed from 20 to 25 percent over the 1988-1991 period.
- The average amount wearers said they spent for their last pair of athletic footwear rose from \$30.10 to \$42.60.
- The most wearers said they would

be willing to spend climbed from \$42.00 to \$61.10.

"Perhaps the most dramatic changes involve prices people said they paid and were willing to pay," says Gregg Hartley, executive director of the North Palm Beach, Florida-based AFA. "Respondents from every segment we've broken out so far said they paid more in 1991 than 1988 and are willing to pay even more.

"We interpret this as evidence that footwear manufacturers have been extremely successful in increasing the value of their products. They've done this by offering technological, structural and design improvements and by successfully meeting fashion and lifestyle needs," Hartley says.

Total retail sales of athletic footwear in 1988 were \$9.7 billion on 377 million pairs, according to the Sporting Goods Manufacturers Association (SGMA). The SGMA estimates that 1991 figures will be \$12.4 billion on 395 million pairs.

Among other findings:

- Teenagers (ages 13-17) are the most enthusiastic buyers of athletic footwear. Ninety-five percent of all teens wear sneakers and 97 percent of that group bought a pair in the last year. Thirty-one percent of teen wearers own more than four pairs. This group spent \$54.20 for the last pair and is willing to go as high as \$76.10.

- The adult market declined in terms of percent of total population wearing athletic footwear, from 87 percent in 1988 to 81 percent in 1991. But the percent of adults who bought shoes in the past year increased, as did the percentage owning four or more pair (from 18 to 24 percent of wearers) and the amount spent for the last pair (from \$29.80 to \$40.20).

- Among blacks aged 13-75, 79 percent wore athletic footwear in 1991 and 75 percent of that number bought a pair in the past year. Thirty-three percent of black wearers own four or more pair and they are willing to spend about as much per pair as are teenage wearers (\$76.20).

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### Survey profiles shopping habits

Shopping in America ranges from stopping for bread on the way home to buying a new car. Nearly half (46%) of Americans go shopping more than once a week, according to results from a national telephone survey conducted by Maritz Marketing Research, Inc. Almost two of ten Americans (18%) shop every day or every other day, while 27% shop two or three times each week.

For almost all ages, men shop on a daily basis more often than women. One-fourth of men 18-34 years old shop daily, compared to 17% of women. Similarly, 39% of men 35 or older, and just 20% of women, shop every day. "A possible reason," suggests Beth Nieman, research manager at Maritz, "is that men make shorter, fill-in trips like going to the store for milk, while women consolidate their shopping into longer, less frequent trips."

The average amount of weekly household shopping expenditures, as estimated by 37% of Americans, ranges between \$5 and \$100. Just over one-

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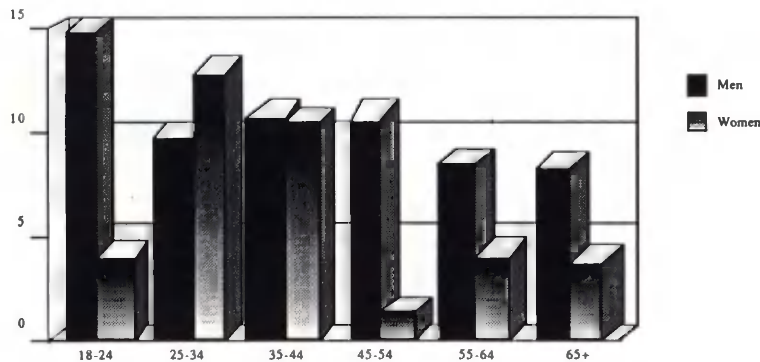
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quarter (26%) spend between \$101 and \$200, while 10% pay \$201-\$400. Only

pared to 61% of married men. Conversely, the number of women who

## MORE MEN THAN WOMEN SHOP ON A DAILY BASIS

*Percent of people who shop every day by age and sex*



4% of households spend over \$400 weekly.

Weekly household expenditures as estimated by men are significantly higher than women's estimates. Men believe the household spends an average of \$192 per week, while women say it's only \$153.

Who's responsible for spending all that money? Significantly more women say they spend all or most of it than men (65% compared to 32%). Five percent of men don't spend any money on household shopping.

Women still do the majority of grocery shopping (78%). But, according to one-third of men, they do all or most of the shopping for household food. This number declines as family size increases. Eighty-two percent of men in one-person households handle the majority of food shopping, as do 85% of women. But, in households of two persons, the number of men drops to 30%; and in families of four or more, it shrinks to 18%.

Overall, 69% of men say they do all or most of the shopping for their clothes and personal care items. Marriage significantly affects this number. Eighty-one percent of unmarried men do the majority of their own shopping, com-

shop for the majority of their own clothes and personal care items increases after marriage from 89% to 95%.

Women make up a large segment of the market for durable goods. Forty-one percent say they do all most of the shopping for major purchases like appliances, furniture or cars. Interestingly, older women are more likely than younger women to handle this type of shopping. Fifty-one percent of females 45 or older do the majority of such shopping, compared to 31% under the age of 45.

### More main meals include a microwaved item

As a part of its National Eating Trends Service, The NPD Group, Inc., Port Washington, New York, tracked microwave usage habits among the 2,000 households that participate in the panel. Results from the study were reported in a recent issue of the company's newsletter, NPD Insights. Some highlights include:

- In 1990, 20% of all main meals included a microwaved item, up from 6% in 1984.
- Americans are not microwaving more often than they did in 1984. Growth has stemmed from new users rather

than frequency of use.

- Singles in 1990 now consume more microwaved food and beverages than families.

- Microwave items having the greatest growth since 1984 are: microwave popcorn, poultry, frozen vegetables, soup.

- Leftovers are not as important to microwave use as one might expect. Only 20% of all microwaved items were leftover dishes in 1990, the same as 1984.

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## Names of Note

continued from p. 21

CSi Testing Centers named **Gary Peters** as mall manager at its Northshore Shopping Center location in Boston. In addition, **Patrick Bucco** has been named mall manager, and **Judy Mammolite** has been named administrative manager at the CSi location in Wayne Town Center, Wayne, NJ.

Market Facts Inc., Washington, DC, has named **Pam Koger-Jesup** study director and **Mary Bannon** associate study director.

Customer Satisfaction Research Institute, Lenexa, KS, has named **Robert Cicerone** to director, TQM services.

Bruno & Ridgway Research, Princeton, NJ, has named **Mary Lynne**

**Fordham, Brad Cox, and George Hausser** as research managers.

**Joe Calvanelli** will head up the new telephone research facility of **TMR, Inc.** in Parsippany, NJ.



Calvanelli

Carlson

**Jody Carlson** has joined *Creamer Dickson Basford* as senior vice president/director of research and strategic planning. Previously she was vice president/associate research director at *Young & Rubicam*.

**Mala Subramaniam** has been named director, marketing research and information, *Blue Cross and Blue Shield of New Jersey*.

**Sherry Marcy** has been promoted to vice president, sales and marketing at *DataStat, Inc.*, Ann Arbor, MI.

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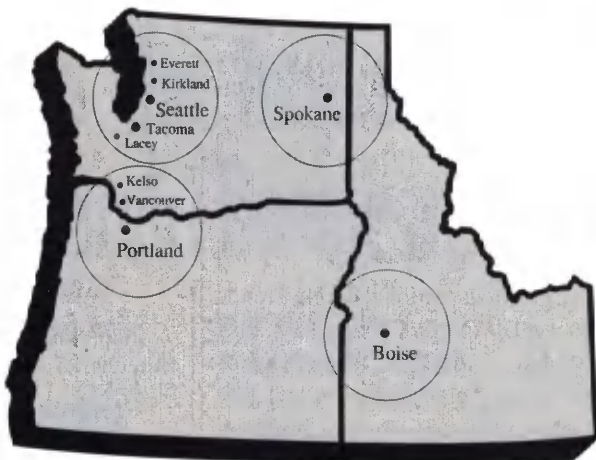
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## Product and Service Update

continued from p. 23

will be available on CD-ROM discs through *Dialog OnDisc* from *Dialog Information Services*, and on-line through *Dialog File 513*. For more information write: *NRPC*, 3004 Glenview Road, Wilmette, IL 60091.

## Snrveys provide data on physicians who manage home health care

*Business Mailers Inc. (BMI)* announces the availability of a new database that profiles physicians who manage home health care patients. In 1991, BMI surveys indicated that more than 31,000 doctors across all specialties treated home health care patients, and studies show that home health care is growing at a rate of 30 percent per year.

BMI's data on home health care was



compiled from self-administered surveys that were distributed to doctors who received the 1992 Physician's Desk Reference. BMI asked doctors to indicate the number of home health care patients they treat, the ages of their patients, the types of home health care they prescribe, and the payer mix percentage (Medicare/Medicaid) of their patients. Response data and trend reports are expected to be available in April.

This new database from BMI is derived from the company's Treatment Oriented Profiles (TOP/s) database, which is a physician targeting and profiling tool. TOP/s identifies doctors based on a variety of practice characteristics, including the diseases they treat, the numbers of patients they treat for each disease, and the methods of treatment they use. TOP/s can provide marketers with data on more than 250,000 physicians and their patient volume, and prescribing patterns for more than 200 diseases and 750 drugs. For more information, call 800-888-8717 (Midwest), 800-524-2751 (East Coast), or 800-242-5478 (West Coast).

## Update of forecasting software

Delphus, Inc. has released a new version of 4CAST/2, a business forecasting and graphical data analysis package for market planners and financial analysts. In addition to the existing complement of statistical forecasting procedures, Version 4.0 enhancements include a new user interface, context-sensitive help screens and additional graphics features to display "hi-lo-close" plots for stock market and commodity prices data.

The new features in version 4.0 include:

- Completely menu-driven with pull-down menus and pop-up windows, designed in a manner to follow the natural steps of a forecasting process.
- Multi-color, split-screen VGA graphics with cursor to track historical data, forecasts, and model output.
- Automated and interactive Box-Jenkins models for seasonal and non-seasonal data.

In addition to the new Box-Jenkins

modeling capability, the program offers a range of statistical forecasting tools. These include models for exponential smoothing, seasonal decomposition, long-term trending, structuring product promotions, life-cycle analysis, pricing studies, multiple and stepwise regression as well as a variety of data analysis tools for transforming, relabeling and adjusting data. In addition, there is a simple programming language to perform ad-hoc analyses for procedures not contained in the menu-driven system. Version 4.0 runs on IBM or close compatible, requires 640K RAM, a hard disk, and DOS 2.1 or beyond. For more information phone 201-267-9269.

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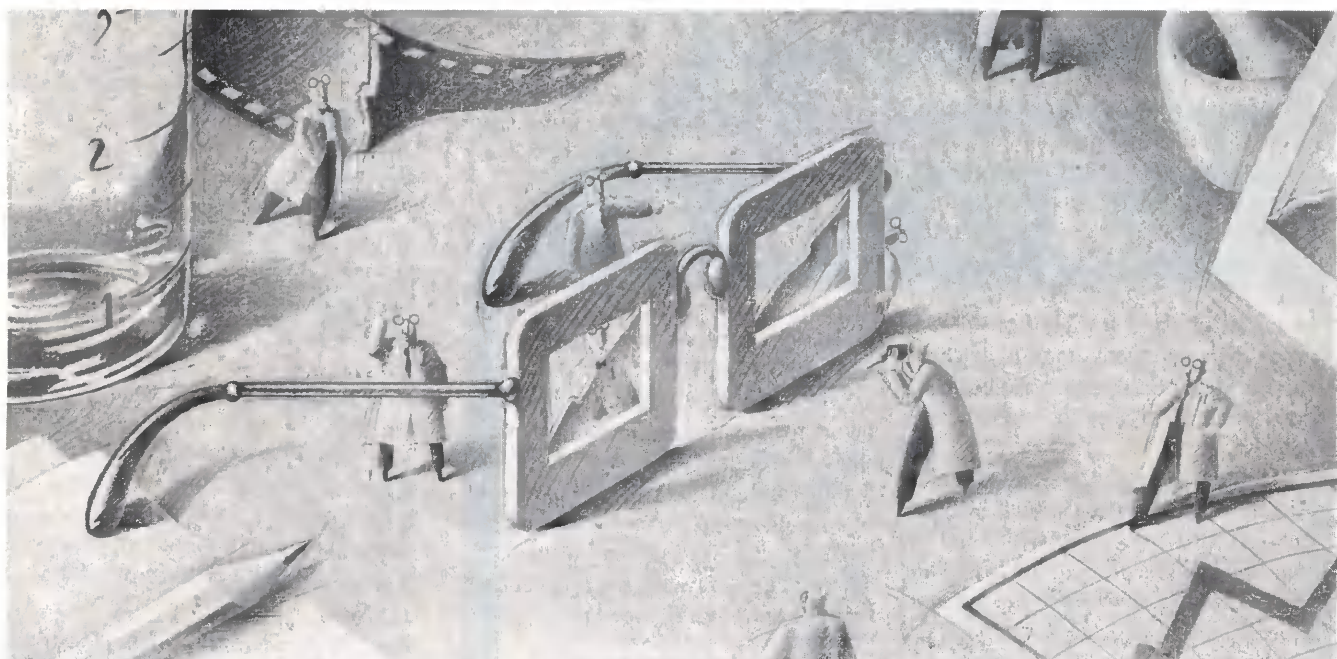
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# How not to recruit for a focus group: reconstruction of an actual interview

by Jim Schwartz

*Editor's note: Jim Schwartz, Ph.D., is market research manager at Newsweek magazine. He gratefully acknowledges the editorial comments of Gene Waggaman and John Wittenbraker during the writing of this article.*

Critical to the success of every focus group is the recruitment of properly screened respondents. Intentional mis-recruitment is dishonest and unethical. If it does occur and is revealed, all data received from improperly screened respondents must be considered invalid. In addition, the effect of these respondents on other group participants must be considered, since their comments may undermine the validity of the entire findings. A case study of an improper recruitment follows.

Recruiter: *Hello, Dr. Schwartz. I'm Alice from ZYX Field Service. We are conducting a focus group with frequent travelers like you and would like to offer you an honorarium of \$100 to participate. Would you like to participate?*

Questions: How did she know my title? How does she know I'm a frequent traveler? From what list did she get my name?

Comment: Not mentioning her last name is, I believe, unprofessional. The amount she offered is quite nice. If it is convenient for me to participate, why shouldn't I?

Jim Schwartz: *Perhaps. First tell me when and where it will be.*

Rec: *There are two choices of one and a half hour each--at either 6:15 p.m. or 7:45 p.m., on Tuesday, October 9 at (location).*

JS: *O.K. I'll attend the 7:45 p.m. session. Thank you for calling.*

Rec: *No, no, wait. Before you go I have to ask you a few questions. First, are you or is anyone in your household employed by a market research company? A market research department? Hotel? Motel? Airline? Advertising agency? Car rental company?*

Comment: This is indeed a "strange" recruitment interview. She has already given me the information for attending and offered me \$100. Now she wants to ask me some questions? If I tell her that I work for a market research department she will disqualify me. Actually, I feel that this particular screening criterion is often unnecessary. To see what tack she will take next, I will say "no" to all of the above. I can always tell her at the end of the interview I've changed my mind.

JS: *No.*

Rec: *Have you participated in any focus group in the past 12 months?*

JS: *No.*

Comment: I have moderated and observed groups during my career, but have never been recruited to be a participant in one.

Rec: *Please tell me which of the following frequent visitor programs you*

*are an active member of. Hotel A?*

JS: *Yes.*

Rec: *Hotel B?*

JS: *Yes.*

Rec: *Hotel C?*

JS: *Yes.*

Rec: *Hotel D?*

JS: *Yes.*

Rec: *Hotel E?*

JS: *No.*

Rec: *Hotel F?*

JS: *Yes.*

Rec: *Please tell me how many days in the last 12 months you have stayed at hotels in each of the following chains. Hotel A?*

JS: *Three.*

Rec: *Hotel B?*

JS: *Six.*

Rec: *Hotel C?*

JS: *None.*

Rec: *Hotel D?*

JS: *Two.*

Rec: *Hotel E?*

JS: *None.*

Rec: *Hotel F?*

JS: *None.*

Rec: *Try and think about Hotel F again. Can you stretch your answer to "at least twice" in the last twelve months? Try and stretch.*

Comment: This is quite remarkable. She is now asking me to lie. She must be desperate to recruit people. All right, I'll accommodate her.

JS: *If you want me to say "two," I'll say "two."*



Rec: Good. Now, please tell me how many different hotels in each of these chains you have stayed at during the last 12 months. Hotel A?

JS: One.

Rec: Hotel B?

JS: One.

Rec: Hotel C?

JS: None.

Comment: This query is unnecessary, because I just told her I have not stayed at a Hotel C even one day in the last 12 months. The script should have called for a skip here. I wonder if it did.

Rec: Hotel D?

JS: One.

Rec: Hotel E?

JS: None.

Comment: If she has a well designed screener with appropriate skip patterns, she is not following it properly.

Rec: Hotel F?

Comment: I now know this chain is particularly important to this project. I actually have not stayed at any of their properties, but I want to find out what she wants here.

JS: Is "none" OK?

Rec: No. Try and stretch. Try and think if you have stayed in at least two different Hotel F hotels in the past 12 months.

JS: OK. If that is what you want (I'll lie for you), two.

Rec: If you had an eleven-day trip to schedule, please tell me how many days you would stay at each of these chains.

JS: (Let me see if she will spill her beans here.) Does this question matter?

Rec: No, it doesn't. Can I help you with this? Let's mark down six for Hotel B, three for Hotel E, two for Hotel A, and zero for the others.

Comment: It is fascinating to see the irrelevancy of reality to her and her ease in supplying the answers for me.

Rec: OK, that completes the interview. You will get a card in the mail confirming the date, time and with directions. Let me confirm your address, etc.

### Observations

Research is a service industry. It involves a high degree of trust among its varied segments. The field services are the pillar responsible for recruiting and interviewing. If they cannot be relied upon to execute their responsibilities properly, the entire research industry is

continued on p. 52

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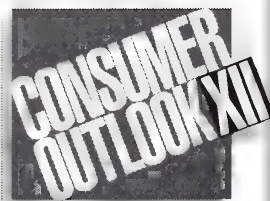
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# QUALITATIVE RESEARCH/FOCUS GROUP MODERATORS

Listed below are names of companies specializing in focus groups. Included are contact personnel, addresses and phone numbers. Companies are listed alphabetically and are also classified by state and specialty for your convenience. Contact publisher for listing rates: Quirk's Marketing Research Review, P. O. Box 23536, Minneapolis, MN 55423. 612/861-8051.

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# Data Use

continued from p. 15

with minutiae is equally counterproductive. Useful data should satisfy both the marketer and the researcher. The real challenge to those in marketing research is finding the right "level of focus" for the wisest "data use."

## Vondruska's Postulates

What we need is a principled way in which analysis can be approached to maximize obtaining the desired information. The "level of focus" notion leads directly to Vondruska's Postulates, which are as follows:

Postulate 1: *Lower levels of phenomenal organization are easier to detect than higher levels of phenomenal organization.*

Postulate 2: *Higher levels of phenomenal organization are easier to imagine than lower levels of phenomenal organization.*

Obviously, the converse of each postulate is implied as well (e.g., it is difficult to detect organization at higher levels). What do I mean by "organization?" Simply that the world is not merely a collection of disjointed atoms in space. Hydrogen molecules organize into stars; people organize into market segments. We see patterns. We see constancy. We understand.

Admittedly, the postulates are a bit abstract. So an illustrative analogy seems in order. Consider the following (familiar?) high school math formulas:

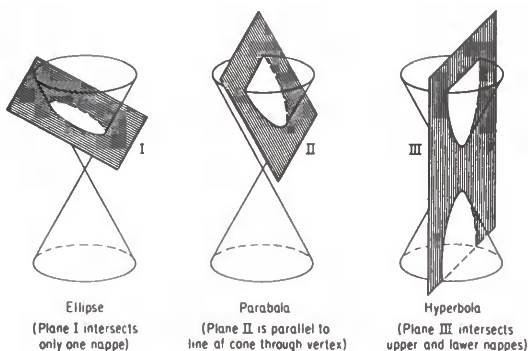
Ellipse:  $\frac{x^2}{a^2} + \frac{y^2}{b^2} = 1.$

Parabola:  $y^2 = 4 px.$

Hyperbola:  $\frac{x^2}{a^2} - \frac{y^2}{b^2} = 1.$

In terms of the postulates, these formulas can be considered at a "low" level of organization. They are useful unto themselves, but no relationship between the formulas is implied. Now consider the illustration of the conic sections in Figure 2.

Figure 2



By re-conceptualizing ellipses, parabolas, and hyperbolas at a "higher" level of "organization," we now see something new. Despite their distinct formulas, we see them as members of the family of plane figures. As the philosopher Ludwig Wittgenstein contended, sometimes things are related by family resemblance rather than common attributes. If we do not know that, we will not look for such resemblances.

The point here is that the same type of mental processes prevail when we work with data. Recasting the postulates in terms of the phrase "He cannot see the forest because of the trees" may help to explain them further.

Sometimes we can easily detect the "trees," but we miss imagining the "forest." And at other times, we get clobbered by "trees" as we dash through the "forest" of our preconceived notions.

The true power of these postulates is that they apply not only to marketing, but to most investigative endeavors. The proper "level of focus" for most meaningful investigations usually lies between the extremes of high and low levels of organization. Often, more than one "focus" is needed to thoroughly understand an array of data. Some, of course, will be more useful than others for particular purposes.

## Facts vs. ideas

Facts "need" ideas, and ideas "need" facts. Examples of the need for both measurement and theory abound in the history of science. The astronomer Johann Kepler spent many years of his life pursuing a mathematical/theoretical framework that would provide an account of planetary orbits. He immersed himself in the mysteries of mathematics in his attempt to bring order to astronomical phenomena. His driving intuition was that the perfection of mathematics must be hidden in the universe itself.

One of Kepler's contemporaries, the lesser known Tycho Brahe, approached the problem of determining the nature of the planetary orbits in a different way. He measured. He collected data. Night after night, he sat at his telescope and dutifully recorded the positions of the observable planets. But to his eye, no patterns emerged from the data. It was only when he and Kepler shared their different perspectives did the true usefulness of the data become apparent. Kepler is credited with the discovery that planets orbit the Sun in an elliptical pattern, but Tycho Brahe had no small contribution to that discovery.

Kepler's discovery of the elliptical orbits of the planets would not have been possible without the painstaking data collection of planetary positions by Tycho Brahe. The key is that Kepler had to consider the facts in his discovery. He would have much preferred the orbits to be perfect celestial circles, but the evidence mitigated against that theory. On a more mundane level, research realities such as these are encountered in marketing research on an everyday basis.

## Hypothesis-driven research

It is not enough merely to subject data to rigorous analysis. The most useful data is gleaned from an analysis in which one



already has a suspicion of what is sought. Hypothesis-driven research also yields the greatest insights from analysis. I have a personal rule that I apply to any analysis. After I have applied all of the "right" statistical tools, I look for "patterns" in the data. When I start to scour statistics manuals to find a procedure that will give me interesting results, I stop. This is a sure sign that I have "tortured" the data into confessing all of its secrets. Alas, sometimes there are no further secrets.

Higher level statistical analyses do not typically uncover relationships that are not at all apparent at lower levels. They simply "formalize" those relationships in a more elegant, and sometimes more useful way. A good example of this is hierarchical log linear analysis. Although there is the potential in this procedure for detecting very high level interactions between variables, these complex interactions are often impossible to interpret—for all practical purposes.

Obviously, there is a big difference between knowing what one ultimately wants to accomplish through marketing research and actually accomplishing it. Ambiguity in research design is especially common in the non-academic world. Invoking another astronomical analogy, it is as though many marketers fail to realize that even though they can see the planet Jupiter, that does not mean that they can get there directly. It takes a long time to get to Jupiter—and when you finally get there it will be in a new location! Both theoretical knowledge and technical knowledge are required to reach distant goals. Only then can the improbable become the

possible.

There is a lesson to be learned here. Straightforward thinking does not always produce the desired result. Some research problems have solutions that possess a property that is denoted in the German language by the word "umweg." There is no suitable direct translation, but the idea is that only a roundabout approach will work. All direct approaches fail. Most puzzles and games incorporate this "umweg" principle. Indeed, Nature herself seems to have an immense sense of humor with regard to thwarting direct approaches.

Of course, marketing research is not exempt from this "umweg" principle. An analysis plan which is too straightforward often founders on the rocks of perplexing findings. Luckily, by understanding the nature of data, we are still able to tease out the actionable information needed for practical marketing solutions.

#### Prediction vs. assessment

Behavior itself is governed by a multitude of factors, some of which are only measurable after the fact. This is a major reason why customer satisfaction research enjoys its current popularity. Marketers realize that although it might be impossible to predict behavior in the marketplace, they can determine the characteristics of products that succeed, and products that fail. If these characteristics are interpreted at the proper level of abstraction, they may be applied to future products with a degree of confidence heretofore not possible.

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Some marketers use the argument that looking at "after the fact" measures such as customer satisfaction is like looking in the rearview mirror while driving a car (after Marshall McLuhan's comments). This is specious thinking, because we do not really have a front window in marketing research. Nor do we have the "crystal ball" that all marketers seem to covet. What we do have is the ability to learn from our mistakes, and to see products and services through the eyes of the consumer. Every projection is a gamble of sorts. Useful data allows us to hedge our bets. It does not provide a sure thing.

Another way to characterize customer satisfaction research is in terms of a feedback mechanism. In much the same way that the thermostat on a climate control system detects deviations from some acceptable range, a good customer satisfaction survey provides information about problems in the marketplace. It should also provide a feel for one's competitive position in the marketplace. This is the best way to use customer satisfaction data. The worst way to use it is as a yardstick to set "goals" for employee performance. This is because customer satisfaction has an intuitively asymptotic aspect to it.

In plain English. 1) you can only please people so much; 2) some people will never be completely satisfied; 3) the more you please people, the more they expect. So if your "goal" is to improve overall customer satisfaction by 5% each year, you are doomed to failure once the "performance curve"

starts to level off (asymptote) over time.

Also, note well that simply because a survey is repeated over time (i.e., a tracking study) does not mean that it fulfills the requirements of a good customer satisfaction survey. What is monitored is as important as the monitoring itself. The acid test for any customer satisfaction program is how well it can detect the problems that detract from the quality of a product or service. If the program does that, it will make a difference to the bottom line as well.

### Implications for theory and action

To obtain a complete perspective on the myriad of different activities that constitute the field of marketing research, we must "take a step backward to admire the work." What we then see is a lattice of interrelated activities leading toward a dual goal—to better understand the consumer, and to better compete in the marketplace.

If I have given a plausible account of the nature of data, then it follows that we sometimes must proceed with marketing decisions based on incomplete information. Looking on the bright side, however, informed decisions are almost always superior to those made in a vacuum. So although we may be tempted to look to data for crystal clear answers, all data can ever really provide us with is prudent guidance for our theories and our actions. Therein lies the main secret to effective data use. □

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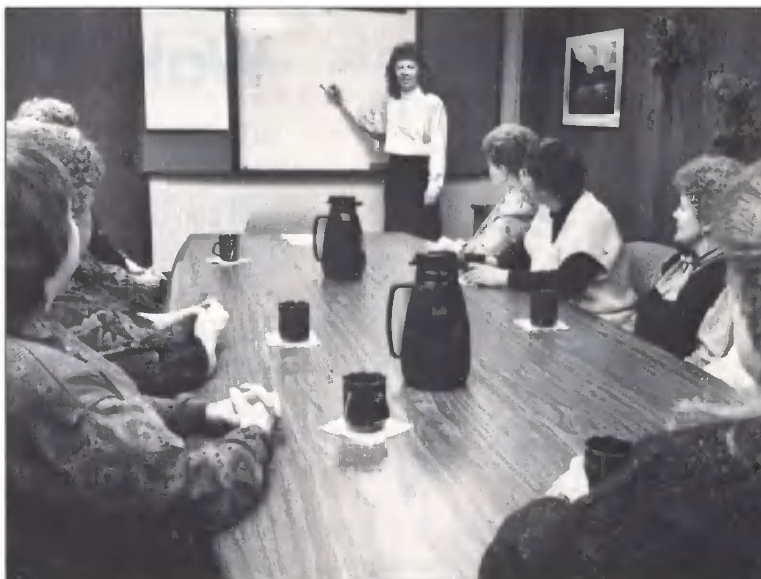
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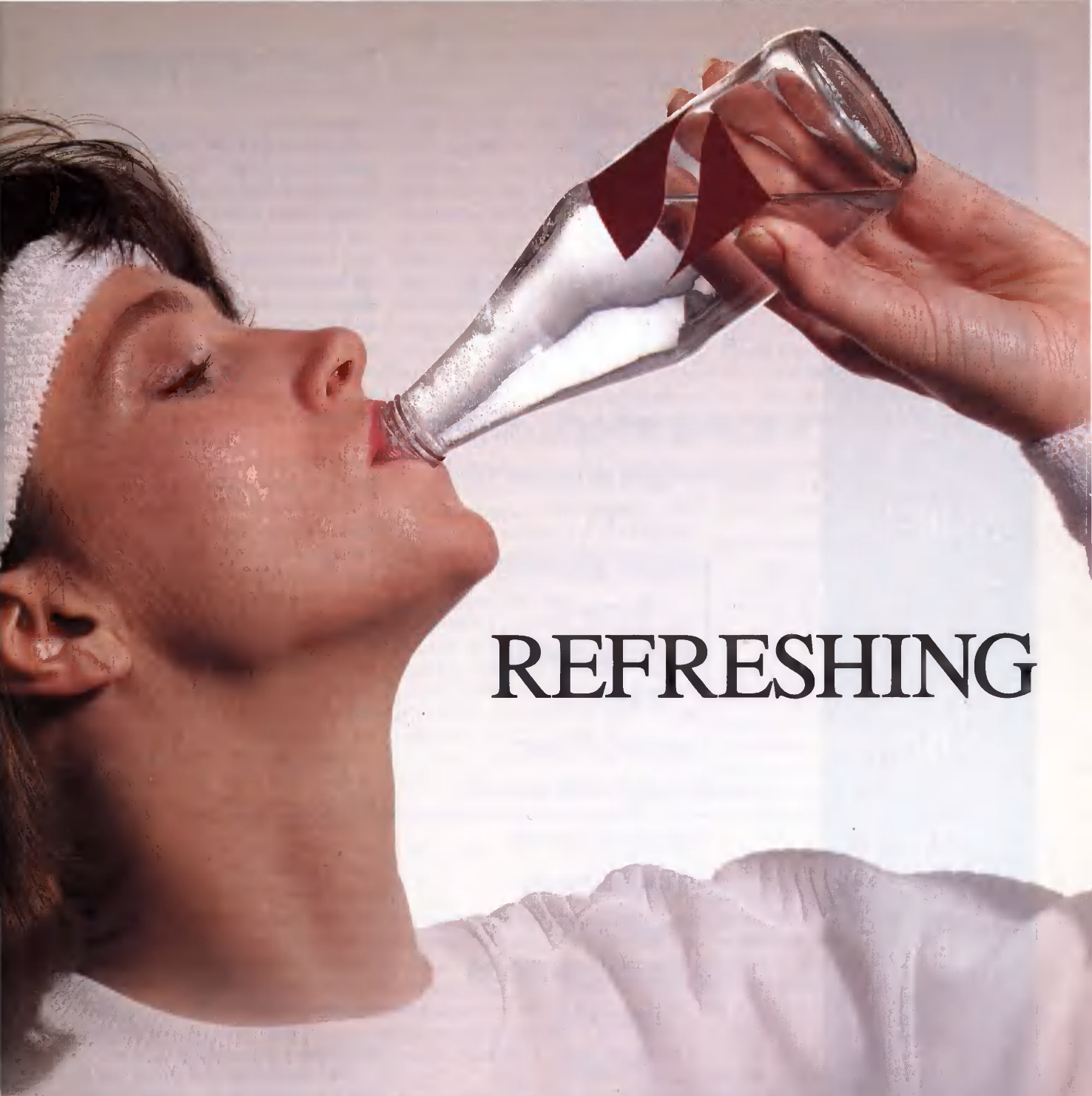
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## Focus Group Recruiting

continued from p. 43

endangered.

Recruitment is the foundation of a good focus group. Every focus group recruiter should be provided with a clear, professionally crafted recruitment form and instructed in its proper use. As I later learned, the recruiter who called me had such a form. Unfortunately she did not follow it. She did not just slightly deviate from the script; this was a case of gross misconduct on the recruiter's part. If she had felt the script was deficient in some way, she, through her supervisor, should have worked with the moderator who arranged for the focus groups to be conducted at her facility to improve it.

She made a cardinal error in offering me a significant honorarium prior to my having met the screening criteria. Having been offered such an incentive, a typical respondent, being only human and perhaps too easily enticed by money, might be tempted to not let the opportunity pass quickly. However, this recruiter compounded the error not only by encouraging me to lie, but even feeding me the "correct" answers.

Though perhaps tired or exasperated by the difficulties of locating properly qualified respondents, she, by her actions, threatened the validity of the entire project. False or biased recruiting procedures inevitably lead to group participants who provide defective information. The long and short of it is that a script must be properly followed, and the incentive for participation must never be offered before other screening criteria have been correctly met.

### Outcome

Did I participate in the focus group? Did I accept the honorarium and give the sponsor biased information? No. After some reflection and discussion with colleagues I decided the best way to extricate myself from this project, so I would not further compound possible error, was to try to reach the study's sponsor. I would have preferred speaking to the moderator, but had no idea of his or her identity. I suspected the sponsor was Hotel F, with the most likely alternative being that chain's leading competitor. Calling Hotel F's corporate headquarters, I spoke to the market research director and asked her to confirm that her company was sponsoring the



focus group to which I had been invited. Although shocked that I called, she said "Yes." I then described the fashion in which I had been interviewed. She said that, as a result of my experience, the entire project was endangered, and might have to be cancelled. My invitation to attend the group was, of course, withdrawn.

I emphasized to this researcher that my purpose in calling was not to get the recruiter fired. It was simply to have her, as the sponsor, realize the faulty procedure used for my recruitment, and then decide how best to proceed. Whatever steps she took, I suggested, should include additional education for this particular recruiter.

### Suggestions for avoiding misrecruitment

Recruiting proper respondents is often a difficult and time consuming task. Here are several suggestions which may help reduce the likelihood of misrecruitment.

First, and most obviously, a proper recruitment form must be prepared. As with every questionnaire, it should be as simple as possible. No "nice to know" questions should be included. To minimize the interview's length, questions requiring skips should be clearly noted.

Second, the screening criteria that determine a participant's eligibility should be kept to a minimum. For example, in this particular study, was it truly necessary that employment at advertising agencies, market research companies/departments, airlines or car rental companies, of either the person phoned or anyone in the household, serve as a criterion for rejecting a possible participant? I understand a client's interest in minimizing the possibility that a direct competitor, in this case an employee of a hotel or motel chain, benefit from proprietary research. However, I believe the longer list of exclusions is unnecessary, and denies a sponsor the opportunity to receive data from many talented people.

This opinion enables me to believe that my response to the question about employment in a market research department, while inaccurate, was not unethical. (Some researchers, of course, will disagree with me.)

Third, the pressures recruiters face must be recognized by clients and reduced as much as possible. For example, recruiters should be provided with adequate time to recruit. About two weeks may be optimum.

Fourth, quality control checks should be built into the recruitment process.

For example, if a call to confirm participation is made the day before a focus group, an interviewer other than the original one should be used. And the confirmation form could contain a couple of validation questions. Alternatively, respondents could be rescreened by another person when they arrive at the focus group facility.

Last, flexibility in the research process is necessary. For example, little is gained by being rigid about the number of participants recruited if unusual difficulties are being encountered. A group of five completely qualified respondents providing accurate information is far more valuable to a project sponsor than a group of ten respondents that includes some who are marginally or improperly qualified. Quality, not quantity, is the operative principal. □

## Corrections

• The technique of Commercial Anthropology, which was featured in the article "Projective technique aims to uncover consumer attitudes" on page 26 of the March issue of QMRR, is a registered trademark of Doreen Mole.

• The telephone number for Raosoft, Inc. listed in the Product & Service Update section on page 52 of the March QMRR should read 206-525-4025.

## Trade Talk

continued from p. 54

they're having to come up with what I would call product line strategies or pricing line strategies. We're seeing a lot more providers who have the same product but with different pricing schemes, such as a lower annual fee but higher interest rates. We're seeing a trend toward a number of organizations dropping enhancements and/or charging fees for optional enhancements such as road assistance, life insurance, etc.

"Pricing is not a one shot deal. You have to keep refining and re-tuning your pricing strategy to meet the competition and meet the changes in the economy, whether it has to do with consumer borrowing or changes in interest rates. It's a continuous effort to re-price. It's much more complicated today."

(Recently, I experienced first-hand the lengths—or should I say, depths—some card issuers will go to to make up for lost annual fee revenue. Hoping to save a few bucks by replacing a card that carried a fee, I mailed back an application for a new card that was fee-free. Soon, a cheerful representative from that company called to give me the good news: I had been accepted, but I would only be issued a card if I took a minimum \$2000 cash advance. Just as I began to respectfully decline the generous offer—and pick my jaw up off the floor—the woman excitedly told me the amount of my "low

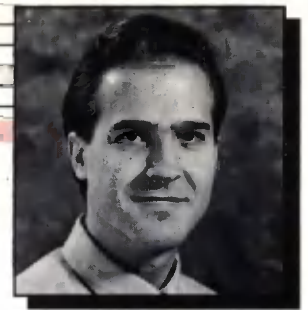
monthly payment" on the "advance." What a deal!)

Card marketing efforts may become more complex as well, if grace period explanations and arcane finance charge calculations make their way into ad copy, Moore says. "It's going to be a lot harder to communicate with the consumer if you're one organization and you're trying to sell against somebody else. It's a lot easier to say, 'Our annual fee is 20 dollars a year, theirs is \$35' or, 'Our interest rate is 13%, theirs is 17%.'"

### Pent-up demand

When consumers finally figure out which card(s) to use, Moore believes there will be a lot of purchasing going on. "There's a lot of pent-up demand. I think when consumer sentiment changes toward the economy, a lot of purchases will be made that have been put off. Obviously if you need a new refrigerator you have to go out and get one but there are a lot of purchases that have been delayed. And until the consumer feels right about it or feels secure, I don't care how much people advertise trying to lend money, consumers just aren't going to go for it.

"There will always be a group who overspends but I think consumers are much more conservative in the '90s. If they aren't unemployed they have a friend who is unemployed or who is concerned about losing their job. We've seen a lot of consumers really cutting back on borrowing until they have that security of the paycheck. They just aren't spending like they did in the '80s." □



by Joseph Rydholm  
managing editor

## Pick a card, any card

**T**he credit card wars are heating up, and the proof is in my mailbox. If it's not an offer for a new card telling me I've been pre-approved, then it's a missive from a card I already carry, telling me about some new service they're offering for only pennies per month.

Increased competition has sent card issuers scrambling to find ways to get new card holders and keep current ones happy, rendering the "plain old charge card" a thing of the past. It's been replaced by a beast loaded with services, options, and enhancements.

How did this come about? First, in the mid-80s the so-called affinity cards sprang up, some with pretty wacky affiliations. For example, why just use a run of the mill Visa card when you can use one affiliated with your favorite football team or radio station? (I half-expect the Resolution Trust Corporation to issue their own card, designed for debt-prone consumers, with a slogan like, "If we can handle the S&L failure, we can handle yours!")

Then, in 1990, AT&T helped make annual fees an issue in credit card choice by unveiling its no-annual fee Universal card. Its success stunned a skeptical industry. More recently, rumblings from Washington, D.C. about capping credit card interest rates drew consumer attention to what they were paying for interest. All of these events have forced card issuers to find new ways to differentiate their cards from the competition.

### Savvy users

With more choices available, and a recession staring them in the face, savvy card users are more value oriented, says Anne Moore, president of Synergistics Research Corp., an Atlanta-based financial research firm.

"Some of the enhancements that were added to credit cards in the eighties were gimmicks or frills that went along with

the excesses of the times. But in the '90s consumers are much more value oriented. They want enhancements that really give them value, peace of mind, or solve a problem for them, and those they're willing to pay for. But they aren't looking for the gimmicks and the frills and the niceties. They're looking for real world helpful things.

"Consumers are much more attuned to comparison shopping, whether it's for clothes or food or bank services. The media has done a very good job of educating consumers on the various deals. Whether it's for credit cards or mortgage rates or CDs, there are comparison charts in the newspaper and on TV, so the consumer is aware that they better comparison-shop to get the best deal."

Synergistics is looking at these issues and more in a study called "Credit Cards: Strategies for a Price-Sensitive Market." Findings will be based on interviews with 800 consumers who are the financial decision makers in their households and who have used a card in the past year. Of the 800 respondents, 200 will be affluent consumers with household incomes of \$75,000 or more. Study results will be available soon.

The study asked respondents about credit card related issues such as the type of card used, pricing, grace period, other services used, satisfaction with the service performance of the card issuer, and attitudes on interest rates.

### Grace periods

Moore says that future points of differentiation for credit cards may include grace periods (some issuers are shrinking them) and how finance charges are computed (one cycle, two cycle, etc.).

"The big thing is pricing. From the provider point of view,

continued on p. 53



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