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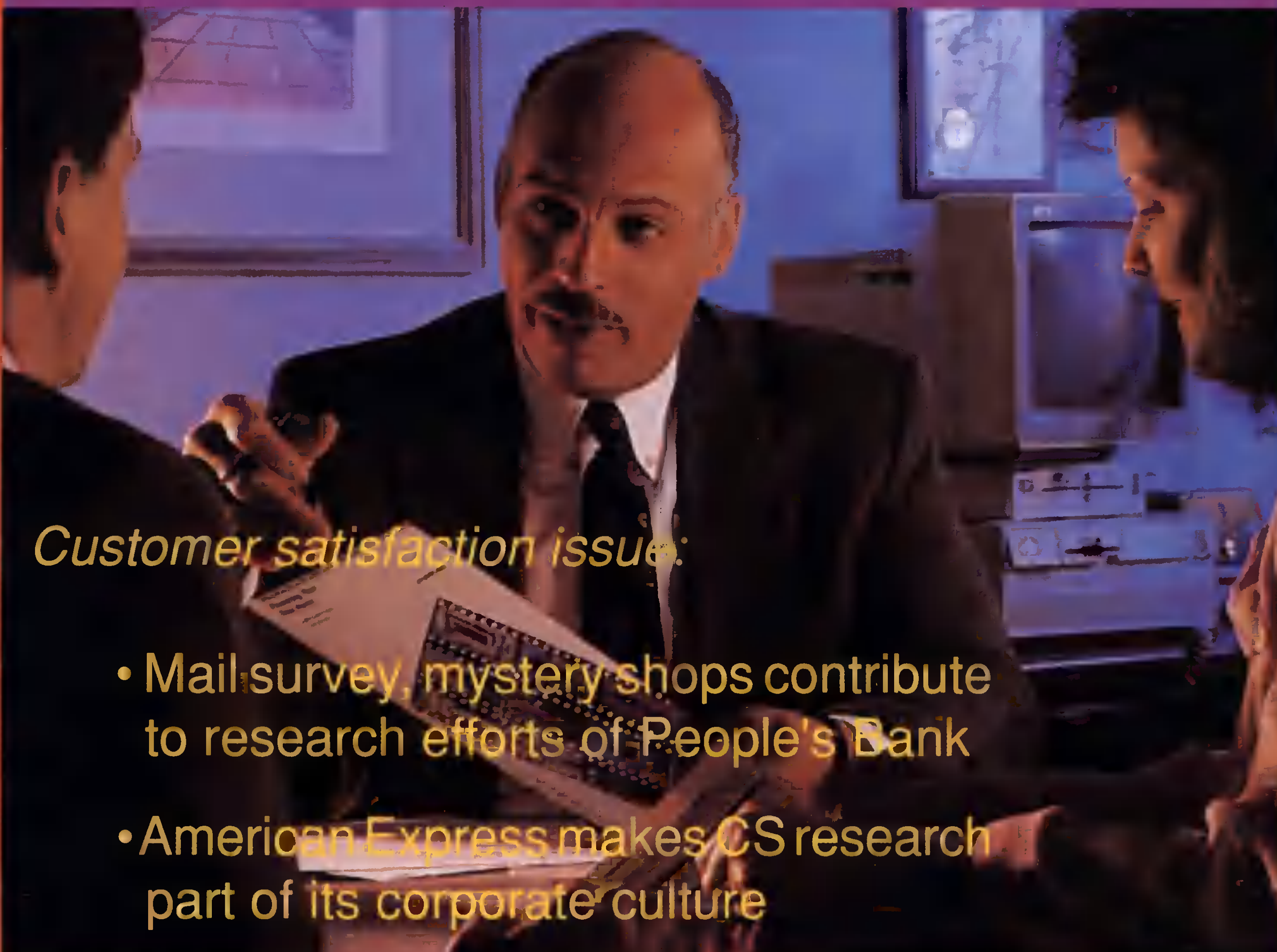

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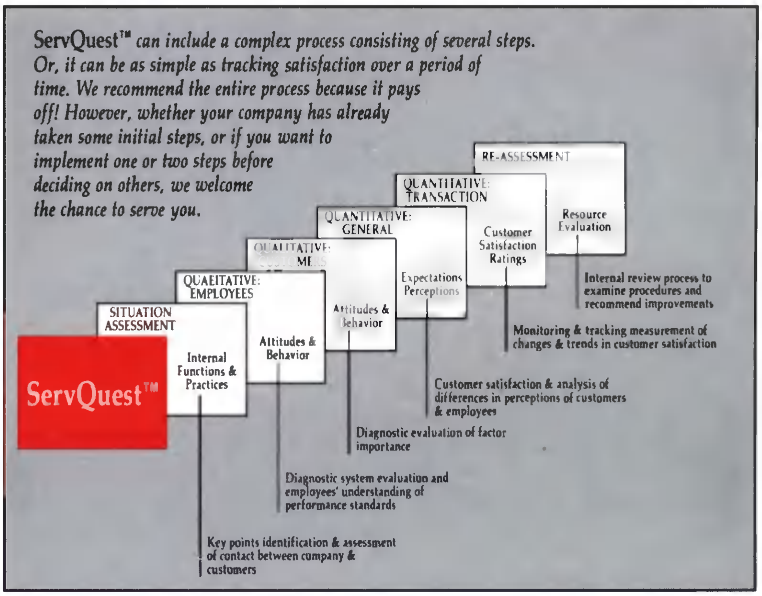

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Features

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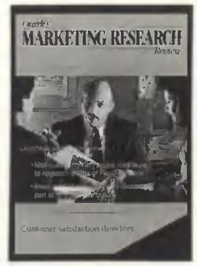

Cover
Connecticut-based People's Bank relies on mystery shopping and a variety of mail surveys to track customer opinions. Photo courtesy of People's Bank.

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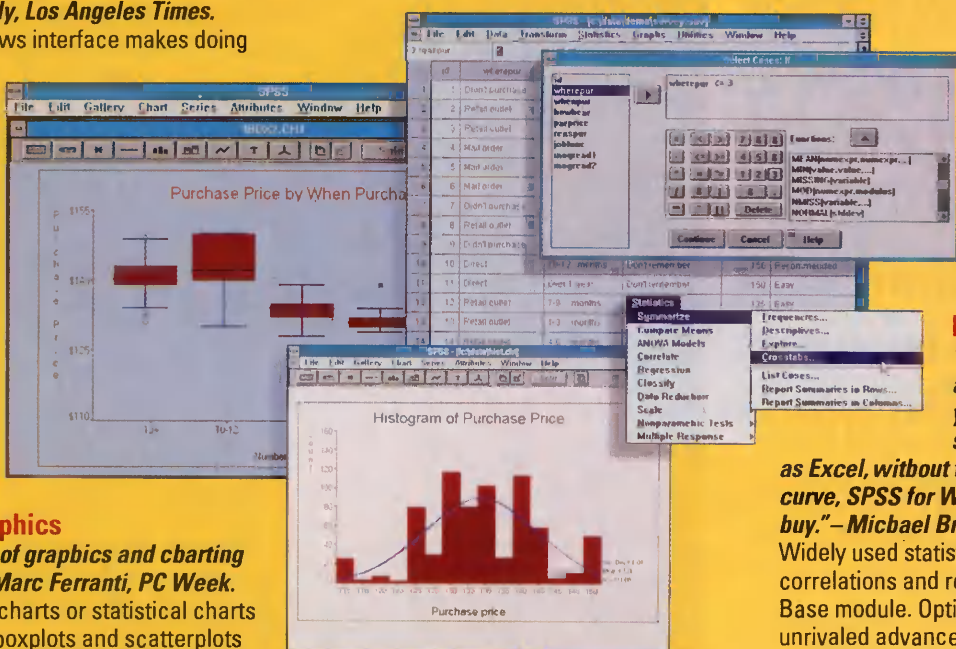

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Sharing a common purpose

Mail survey, mystery shops and other research contribute to Connecticut bank's customer satisfaction efforts

by Joseph Rydholm
managing editor

For many banks, the economy's sluggishness has forced a re-evaluation of what sets one financial institution apart from another. A few years ago it was interest rates on CDs or money market checking accounts. Good service was still important, but for many consumers, an extra percentage point of interest was worth more than a teller's greeting or short lines on a Saturday morning.

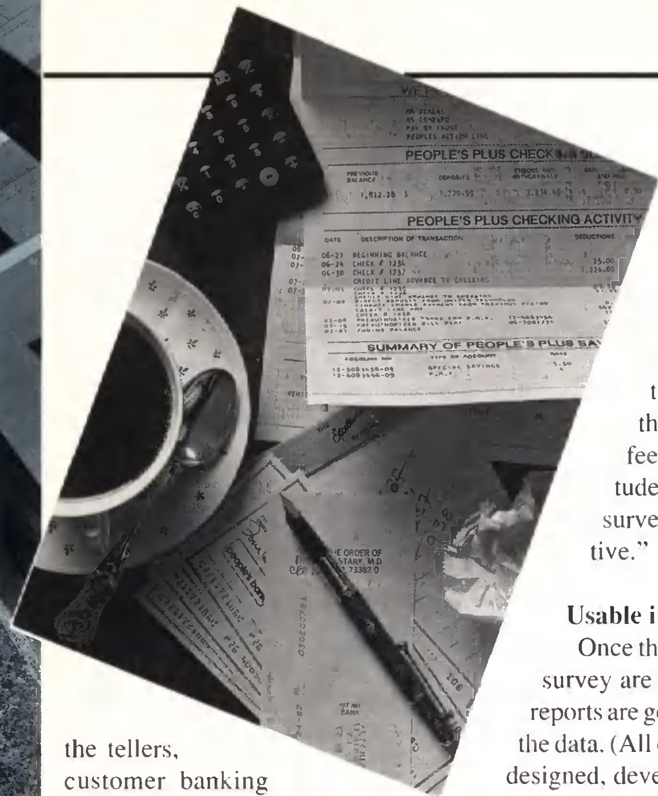
Lately, with interest rates dropping, CD-happy consumers have fled banks, cash in hand, looking for investment options (such as mutual funds) with potentially more attractive yields. As a result, customer service has emerged as an important point of difference for banks. With most banks offering checking accounts and other products with similar features, what's the difference between Bank A and Bank B? For many consumers, the answer to that question is service.

As its name implies, People's Bank knows the importance of service to its customers. In its 150 year history, the $5.8 billion Connecticut-based financial services institution has felt a strong commitment to the people who bank at its 71 branches. This has helped the bank compete in a downturned economy, says Judy Rogers, customer service manager, People's Bank. "It's a very competitive environment. With what's happening in the banking industry, here in New England and in general, you need to take advantage of every opportunity in the marketplace."

Annual survey

The bank relies on a variety of research tools to make sure its service is up to customer standards, including an annual survey of checking account holders and an ongoing mystery shopping program.

Each year, thousands of surveys are mailed at random to checking customers. The survey first identifies which branch the customer visits most often and then asks the respondent to rate the level of service he or she receives at that branch, specifically the performance of



the tellers, customer banking representatives, and branch managers. Space is also provided for a more detailed explanation of the customer's overall satisfaction level. For each employee type, the customer indicates if the teller met service expectations by providing prompt and accurate service or giving the customer his or her undivided attention, for example.

The survey also looks at customer impressions of telephone contact with the bank and asks why one branch is used over another.

Mary Ann Vlahac, manager of marketing research, People's Bank, says that the bank decided on a mail survey after pilot testing different methods at branch locations, including a survey that customers completed while at the bank. "We found that the most successful method was to mail them a survey which they could return to us at their leisure."

Initially the survey was included with account statements but low response rates were a problem. So the most recent versions have been sent out separately, resulting in much higher response rates.

Vlahac has done extensive follow-up work to check for nonrespondent bias. "I looked at the demography of who responded, in terms of how long they've been a customer of the bank, their age, their income, and along with what we already know about our customers from our database, they were virtually identical. We did some phone follow-up and in-branch interviews on the same questions just to see if the attitudes were the same and that's why I feel confident that the attitudes that came out in the survey returns are representative."

Usable information

Once the results from the annual survey are tabulated, more than 80 reports are generated on all aspects of the data. (All of the bank's surveys are designed, developed, and analyzed in-house.) Vlahac says that in her reports to branch managers, she strives to make the information usable. "I don't bog the reports down with a lot of complicated terms. I feel that the branch manager should get the report, be able to read through it and act on it, without having to go through a glossary to figure out what I'm talking about."

The branch managers receive the reports and then review them with the tellers and customer banking representatives. If there are problems a corrective action team is formed to deal with them. Vlahac says the bank is careful to identify where the problems are coming from and make sure that actions are taken in the right service area. "For example, a customer might be having problems with his or her statement, and they perceive it as a branch-related problem when it's really coming out of main office operations."

Service quality index

A long range goal is to develop a service quality index, using information from the customer satisfaction surveys and internal data. To that end, Vlahac has done regression analysis to look at the relationship of a number of elements to customer satisfaction, such as: Does the number of competitors' branches in an area have a relationship with customer satisfaction? Level of staffing? Transaction volume? Length of time as a bank customer?

"I've been using the regression more for management within headquarters to get them thinking about the bank, service, competition, market share and everything else as a total equation, rather than seeing service as only an element of the formula."

Even things such as branch appearance seem to have an effect, Vlahac says. "There is the belief that the better-looking the branch, the more satisfied customers are with branch service. I've heard that in a lot of focus groups as well. As a bank invests in the maintenance and upkeep of a branch, customers take notice. And, as a carry over, employees would have a greater pride in their work and offer better service if they felt better about their working conditions. If conditions are deficient, you might get a poor work ethic and in addition, customers might start thinking that the branch is not being run well and wonder, if the employees aren't paying attention to the details of the maintenance of the bank, are they doing the same with my account?"

The bank monitors customer satisfaction with other product and service areas through a number of mail surveys, which are sent, for example, to new customers or people who are refinancing their mortgage. These surveys are helpful because they let the bank monitor the performance of employees in areas other than walk-up service. For example, people who take out a home equity loan or a second mortgage may have a lot of phone contact with People's Bank employees, Vlahac says. "It's nice to have a separate survey instrument there because customers may rely on telephone calling into People's Bank to find out the status of their application, which is a lot different than if they're dealing with a branch on transaction-related issues."

Focus groups

To supplement the data from the annual survey and the other research,

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Corporate culture

At American Express Travel Services, management and employees at all levels use data from customer satisfaction research

by Joseph Rydholm/managing editor

For a trip to go smoothly, planning and coordination are essential. Whether it's a vacation or a business trip, many elements have to come together. Airplane flights and hotel rooms have to be booked. Rental cars have to be reserved. Most people prefer to have someone else do the coordinating. One of the largest companies providing this service is American Express Travel Related Services, a division of American Express that provides travel services for card holders, consumers, and corporations over the telephone and in-person through a network of travel bureaus.

Mitchell Gross, director of quality services, Travel Service Division of American Express, says that customer satisfaction/service quality research, particularly an ongoing telephone interviewing program, keeps American Express in touch with customer perceptions of its performance.

"In a business of this complexity, where every transaction is important, we rely on the research to help us step back from the day-to-day hustle and look at things from the customer's perspective," Gross says.

"The research is the cornerstone of our process improvement work that we do. We start by eliminating non value-added work, by involving and empowering our front line employees who know the most about customers, and then taking the remaining elements—the things that do add value—and making them work in the most efficient way possible. All of that starts with a clear understanding of the things that drive customer loyalty."

The telephone interviews are conducted to measure satisfaction with membership travel services provided to Gold and Platinum American Express Card holders, and also to the businesses that use American Express to book their corporate travel.

During the 10-15 minute interviews, respondents who recently used American Express to book a trip are asked to indicate their overall satisfaction level and the likelihood that they'll use American Express to book a future trip. They also score American Express' performance on a variety of service dimensions.

Needs assessment

The service dimensions were uncovered and clarified during needs assessment work done prior to developing the survey program, Gross says. "We found that there were a number of service basics or dissatisfiers that don't appear through the normal methods. We look at satisfaction from both angles: satisfiers and dissatisfiers. Satisfiers are the things that, if you do them well, create satisfaction and if you do them poorly create dissatisfaction. Dissatisfiers are things that upset the customer if you mess them up but that you don't get credit for doing right. They include things like getting tickets delivered on time. No one's going to write a letter to the president saying, 'you guys just blew me away, I booked my trip two months ago and my tickets actually got here when they were supposed to.' But if you mess up on that you can count on losing a customer."

Richard Reiser, chairman of BAI, the Tarrytown, New York-based marketing research firm that works with American Express on the telephone survey, says that the needs assessment work is an important step in pinpointing how the customers define satisfactory service.

"It isn't sufficient to deal with generalities when you're doing customer satisfaction or quality of service work. It's not enough to have the customer say well, 'they provide me with prompt service.' You have to understand what prompt is and what services they're talking about.

"For this project, a major piece of research was done to define precisely what different kinds of travelers were looking for in different parts of the travel process. We wanted to separate what is the responsibility of the travel agent from what is the responsibility of the hotels, the airlines, etc. Once that piece of research is done, you come up with the factors that are important and you understand the meaning of each one."

Using those factors American Express and BAI developed a questionnaire that could be administered over the phone, Reiser says. "The process has evolved to the point where the items that we're measuring can explain almost all of the overall satisfaction with the travel service. It's very important to be able to demonstrate that there's a relationship between what you're measuring and the overall measure of satisfaction. It's fairly easy to measure each part of the equation, but you have to know how those pieces add together to create overall satisfaction."

Open-ended questions

An important feature of the questionnaire, Gross says, is the presence of several open-ended questions, which allow American Express—specifically the managers and employees of the travel centers—to hear the customers' feelings in their own words.

"Our objective is to establish a foundation, a common language around the customer. Even our closed-ended questions use the customers' words, we don't rephrase what they tell us. All the questions in the surveys are words that customers said. It can be harder to work with at first but it's very consistent with our customer-obsessed culture," Gross says.

For example, Reiser says, if the branch manager of a bank is given a research report showing customer dissatisfaction with the tellers, he or she might say, that's interesting, but what do I do with that information?

"If you give it to them in the customer's words, such as, 'I went to the teller's cage and he was writing something on a piece of paper and then turned to talk to somebody else for two minutes,' that is specific and it shows the manager why the customer was dissatisfied. By producing open-ended information, you can enrich the structured responses that come with the quantified evaluation."

Meaningful to employees

Making the research meaningful for employees at all levels of the company—especially those who deal with customers every day—was a goal in designing the research. It's also key to making the most of customer satisfaction research findings, Gross says.

"People who interact with the customers daily are really the ones who make the business work so that's where we put the information. The science that's behind the customer research is most powerful when linked to the insight, experience and passion to get the insight of our front liners."

"Customer satisfaction work should not be done for the purpose of reporting to management," says BAI's Richard Reiser. "It's for the purpose of managing and improving your business and improving profits. Therefore it has to be useful down to the operational level. American Express is able, through the system that we jointly developed, to take customer satisfaction work and bring it down to the operational level. They can use it to train people by letting them know what customers do and don't respond to and what produces dissatisfaction."

For a company as large and decentralized as American Express, it can be difficult to meet with all of the employ-

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DATA USE

Regression-based satisfaction analyses: proceed with caution

By William G. McLauchlan

Editor's note: William G. McLauchlan, Ph.D., is principal, McLauchlan & Associates, Cincinnati.

The notion that overall supplier satisfaction can be "modeled" as a function of attribute performance or satisfaction ratings is not new. Those who advocate this type of analysis typically advance a premise along the following lines: if the variance in supplier performance ratings on a given attribute explains variance in overall satisfaction with the suppliers, then the attribute is determinant of satisfaction. On the face of it, the premise is compelling. At the same time, however, it is fraught with both mathematical and philosophical dangers.

Consider the following simple (hypothetical) data set:

Overall Satisfaction	Attribute Satisfaction A	B	C
7	8	8	7
8	9	8	5
6	7	8	5
9	8	8	4
4	4	8	3
9	9	8	8

Visual examination of the data indicates that, in general, as ratings on Attribute A increase, so too do the ratings on Overall Satisfaction. Further, while not as striking as the apparent relationship between Attribute A and Overall Satisfaction, ratings on Attribute C also appear to be positively correlated with Overall Satisfaction. Finally, Attribute B is constant regardless of Overall Satisfaction (8). Calculating the Pearson bivariate correlation coefficients confirms these observations:

	A	C
Overall Satisfaction	.91	.54
A		.69

Proponents of correlational or regression-based approaches to satisfaction would argue that Attribute A, and to a lesser extent Attribute C, are determinants of satisfaction. Attribute B would be regarded as inconsequential in the understanding of overall satisfaction.

The correlational analysis can be extended in the following simple regression analysis:

$$\text{Overall Satisfaction} = \text{Constant} + (b_1)(\text{Attribute A}) + (b_2)(\text{Attribute C})$$

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(Because Attribute B exhibits linear dependency, the matrix with B included is ill-conditioned. Therefore, Attribute B is dropped from the analysis.)

The following parameters are estimated:

Constant	0.13
b1	1.07
b2	-0.18

Here is where the trouble begins. The negative coefficient associated with Attribute C would suggest that one way to increase Overall Satisfaction would be to strive for lower satisfaction on Attribute C. Clearly this is not the case. The bivariate correlations indicate that Overall Satisfaction and Attribute C are positively correlated. The seeming inconsistency actually results from the relatively high positive correlation between Attributes A and C. When two regressor variables are themselves highly correlated (collinear), the parameter estimates are unstable and therefore, unreliable.

In a more realistic example where one might have 20 or more regressor variables, the problem (now multicollinearity) is exacerbated. Consider an industrial product category where satisfaction or performance might be measured on such attributes as on-time delivery, product availability, adequate inventory, and compliance with shipping dates. Another group of attributes might be related to pricing policies and value, and so forth. It quickly becomes obvious that in our efforts to quantify satisfaction on as many aspects of the product offering as possible, we are typically measuring the same dimension in several similar and likely correlated ways.

To handle these types of situations, a principal components analysis is often performed. By reducing the attributes to their underlying and orthogonal or independent constructs, it is possible to avoid problems of multicollinearity. At the same time, however, the regression-based analysis can become even less appealing. Experience tells us that because we usually have many fewer observations per attribute than is demanded for a robust principal components analysis, the solutions that we typically settle on may explain only 50%-60% of the variation in the data. As such, any regression analysis based on component scores is already compromised by the unexplained variation in the components.

Further complicating the issue is the plain fact that the regression analysis itself will never explain 100% of the variance in the criterion. Typical R2 values for satisfaction regressions are never as high as one would like and are often very low (.20-.40). The question begged by these kinds of outcomes can be stated quite simply: Is it reasonable to ask management to make decisions based on models that explain only 15% or so of the variation in satisfaction measures using component scores that explain only 50% of the variation in the attribute ratings?

If the mathematical issues discussed thus far were not enough to raise serious concerns about the value of regression-based satisfaction analyses, there are also philosophical issues to consider. Proponents of a regression-based approach to satisfaction often view the results as surrogates for attribute importance measures. In other words, an attribute or component that explains a significant portion of the variation in the criterion is deemed to be important; attributes that are not significant predictors of satisfaction are not important.

The risks in this argument are two-fold. First, as is well known, correlation is not synonymous with causation. To suggest, then, that an organization would improve Overall Satisfaction ratings by improving on attributes that are correlated with the Overall measure is an extremely dangerous proposition.

The second element of risk is a reflection of what Carl Finkbeiner of National Analysts referred to at the recent Sawtooth Software Conference as the "world-as-it-is" perspective presented by satisfaction-based regression analyses. This perspective can be understood by reconsidering the hypothetical data set.

Recall that the ratings on Attribute B were a constant 8 and that the regression-based analyst would regard Attribute B as inconsequential as it relates to Overall Satisfaction. Assume for a moment that stated attribute importance ratings were also collected and that the complete data set was as follows:

Overall Satisfaction	Attribute Satisfaction A	B	C
7	8	8	7
8	9	8	5
6	7	8	5
9	8	8	4
4	4	8	3
9	9	8	8
Stated Importance ==>	5	9	7

By using the correlational results as a measure of attribute importance or determinance, in spite of the already discussed dangers of this approach, Attribute A emerges as most important, followed by Attributes C and B. Using stated importance ratings, Attribute B is most important, followed by Attributes C and A.

The fact that satisfaction on Attribute B is high and equivalent across observations should not be construed to mean that Attribute B is unimportant. It simply means that performance is currently satisfactory, and highly so, on an attribute that, on a stated basis is extremely important. A manufacturer that considers allocating resources away from Attribute B because performance in a "world-as-it-is" today perspective is fine is at serious risk. As soon as performance drops on the now disregarded Attribute B, the variance that was once missing in the ratings data is introduced and correlational or regression-based results would reflect the newfound importance of Attribute B. Unfortunately, it is too late for the manufacturer.

There are numerous other risks associated with regression-based approaches to satisfaction analyses. For one, missing data can be the curse of any multivariate technique. If a respondent chooses not to rate an organization on one or two attributes, "plugging" the missing values with means is an acceptable procedure. If more than a few ratings are missing, the respondent is lost for further analyses. While there are techniques available for directly factoring correlation matrices, as opposed to the raw data, the results of these analyses can be highly unstable and misleading.

Also, regression-based results can vary widely depending on the way the model is specified. Stepwise regression and forward and backward selection techniques can produce different outcomes when compared to regression procedures that fit a full model. The manner in which the sums of squares are partitioned (Type I versus Type II) will lead to different conclusions as well. Anyone venturing into these areas is well advised to consider the implications of the modeling technique.

In conclusion, regression-based satisfaction analyses are not as straightforward as might appear at first glance. They do not produce causal models, they are subject to problems related to ill-conditioned data (multicollinearity, missing values), they do not do a particularly good job of explaining the variance in the Overall Satisfaction measure, and they reflect a "world-as-it-is" perspective. I believe that we should place greater weight on stated attribute importance ratings and perform importance-performance and GAP analyses. Not everything we do needs to be "modeled." ❑

LETTERS

Editor's note: Welcome to the newest addition to Quirk's Marketing Research Review! *The "Letters" section is your space to comment on or respond to the articles that appear in our pages. We hope it will serve as a forum for the exchange of ideas on all manner of research topics. When you write, please include your name, job title, firm name, address, and a phone number we can reach you at during the day. We reserve the right to edit letters for clarity or space. Send letters to: Joseph Rydholm, Quirk's Marketing Research Review, P.O. Box 23536, Minneapolis, MN 55423.*

Client may bear responsibility for recruitment problems

Your article on "How not to recruit for a focus group" (April, 1992) struck a very familiar note among our staff. Although we have no way of determining just how widespread this type of behavior is in the research industry, our general assumption is that your example is not all that uncommon. We can argue all day long about whether or not this assumption is correct; but the truth of the matter is that it doesn't have to happen. And, the one most responsible for this type of behavior in the industry is not necessarily the interviewer or the field service. It may very well be the client.

First of all, we feel that the reason why poor quality recruiting occurs often stems from the pressure clients put on the recruiter. As Jim Schwartz proposes in the article, part of this may just be time pressure. But take a look at the bigger picture. Are you asking the recruiter to take all of the risk in the recruiting process?

When you ask for a job to be done, do you expect the recruiter to perfectly estimate the amount of resources needed to accomplish the task? What if the incidence rate of qualified individuals is lower than expected? Does the recruiter feel that you won't pay for the extra phone calls it will take to get the job done?

And what about human nature, as illustrated in the article? How stupid do you think respondents will be that they won't be able to guess what the correct response might be that will result in an invitation to collect the incentive?

Our solution, for the most part, is based on the principle that the respondent should voluntarily, and without any unwarranted clues, indicate their qualifications for participation in the study. Because of this, we almost always employ a mail screen. We also have the advantage of obtaining lists of potential respondents based on ownership of specific vehicles, which, in the case of automotive research, is a very good pre-screen for focusing in on a target group.

Respondents return the mail screen at about the same incidence rate as a telephone recruit effort, so the potential non-response bias is about the same in both instances. But since the mail screen asks for a broad variety of responses in terms of current purchase intentions, the respondent is rarely able to predict which response will result in an invitation. And there is no interviewer involved in the process, so there is no chance to "hustle" the respondent into giving the correct qualifying responses.

But the real key to quality control is the way in which our studies are speci-

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Determining attribute importance

by Randy Hanson

Editor's note: Randy Hanson is director, analytical services, for Maritz Marketing Research, St. Louis.

In a typical customer satisfaction study, respondents evaluate one or more products or services. Satisfaction on an overall basis is rated, followed by ratings on many individual attributes. A key question for marketers is which attributes are most important in determining overall satisfaction. Certainly, not all attributes have equal impact. A method of prioritizing is needed to allocate limited resources more efficiently.

Researchers have suggested many procedures for dealing with this problem. Several are considered by Green and Tull (1975) and Hauser (1991). Work continues in this area; no one true "answer" for all applications has emerged. One broad classification of the many approaches is *stated versus derived importance.*

Stated importance

These measures ask respondents to explicitly state their perception of the importance of each attribute. Three examples of how these data are collected are shown below:

• 10-point scale. Rate the importance of _____ from 1 to 10, where 10 means "extremely important" and 1 means "not at all important."

• Ranking. Rank the following 17 attributes in terms of their importance to you. Rank the most important attribute "1," the second most important attribute "2," and so on.

• Constant sum. Allocate 100 points to the attributes listed below to represent how important each is to you. You can use any number between 0 to 100, just make sure the points you give an attribute reflect its importance, and that your answers sum to 100.

A few major corporations have chosen stated importance as their preferred method. Reasons include the face validity of the results and the method's straightforward administration and interpretation. This view is supported by Hauser, who writes "self-stated importances (have) sufficient validity."[1]

While stated importance is valid in theory, its performance in practice is uneven. The techniques assume respondents are able to reliably assign a number to their perception of importance. Depending on the particular population sampled, this assumption can represent a substantial leap of faith. In addition, interviews using stated importance measures are longer, more repetitive, and more tedious.

Perhaps a greater criticism results from the usual procedures for customer satisfaction studies. Qualitative research is first conducted to construct a list of attributes, and the attributes retained for the quantitative phase of the study are generally the most important of these. This situation leads to high ratings for most attributes. The result can be few (if any) statistical differences among attributes, so the aim of the study—to prioritize the attributes—is thwarted.

Derived importance

Derived importance relies on the statistical association between attribute ratings (predictors) and an overall rating (criterion). The importance of an attribute is statistically determined from this relationship.

As an example, assume we have two products, Q and R, rated on two attributes, 1 and 2, and that product performance on the attributes can be summarized as:

	Product Q	Product R
Attribute 1	Excellent	Poor
Attribute 2	Poor	Excellent

Say that we also know Product Q has higher overall satisfaction levels than Product R. We can then infer that At-


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Beth Rounds is Senior Vice President, Custom Research Inc., Minneapolis
"Our success depends on client service — satisfying our customers is our highest value, the driving force behind everything we do. And that makes us pretty demanding of our research partners.
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tribute 1 (on which Product Q excels) is more important than Attribute 2 (where Product R excels) in determining overall satisfaction levels.

Green and Tull consider four derived importance measures. In the almost impossible case where all attributes are uncorrelated with each other, all four yield identical measures of relative importance.

• p - bivariate (Pearson) correlation. This measure has the advantages of familiarity and simplicity. Unlike the other three, it is not affected by adding or deleting other attributes in a regression equation. Its principal disadvantage is that joint effects with other attributes go undiscovered.

• b' - standard regression coefficient or beta weight. A standard part of most regression output, it can be quite unstable. A raft of somewhat unlikely assumptions must be satisfied for these measures to provide the best estimates. Model misspecification and the influence of other attributes in the regression model are particularly troublesome.

• b'*p - the product of the beta weight and the corresponding Pearson correlation. This calculation is an interesting compromise between the two earlier measures. Even in the presence of correlated predictors it has the property of summing (across all attributes) to R^2, the percentage of variance explained by the regression model. It shares the disadvantages of both measures that comprise it.

• p (m-1) - the coefficient of part determination. This measure represents the incremental gain in predictive power when an attribute is the last one added to a regression equation. It is also adversely influenced by the inclusion or exclusion of particular attributes in the model.

It is commonplace in customer satisfaction research for the attributes to be correlated—sometimes highly—with each other. The problem, called multicolinearity, makes it difficult to disentangle the separate effects of the individual attributes on overall satisfaction. The latter three measures are all subject to instability when multicolinearity is present. When intercorrelations exceed .5—a fairly frequent occurrence for customer satisfaction data— the beta weights can shift can shift dramatically, perhaps even changing sign.

The latter three measures can also be affected by the addition or deletion of particular attributes to the regression model. Additionally, the omission of important attributes from the study is a concern. Finally, the multiple regression model used for the latter three measures must have the correct functional form.

Green and Tull conclude their discussion by stating:

"Unfortunately, all four measures exhibit limitations in the case of correlated predictors and the question of relative importance remains ambiguous." [2]

The potential pitfalls from using the latter three measures can make the situation more unclear than it is already. In the face of this murkiness, it is best to use the first measure, simple bivariate correlation.

But, considering each individual attribute in isolation is also unrealistic. Given the collinear structure of consumer satisfaction data, what can be done? Green and Tull offer three alternatives to combat multicolinearity. First, you can ignore it. This may be acceptable for forecasting applications, but not for the task at hand.

Second, you can delete one (or more) of the highly correlated attributes. This solves the statistical problem while creating others. A managerial problem, for example, might be questions such as, "Why is my attribute not included in the analysis?" My attribute is not the same as the one included!"

Third, you can transform the original attributes into an uncorrelated set of new variables using several techniques (e.g., principal components analysis). The last alternative is the best. The principal components reveal the structure present in the data while allowing analyses such as stepwise multiple regression to be performed without multicolinearity problems.

Conclusions and suggestions

The study of attribute importance will continue in the future and some of the viewpoints discussed here may change. Given the current state of affairs and the reasons cited, use a derived measure of importance over a stated measure. It is intuitively appealing to this researcher to use both the actions of respondents, as revealed by their rating patterns, as well as their words to determine attribute importance.

Among the class of derived measures, use the simple bivariate correlation between an attribute and overall satisfaction. Theoretical and practical experiences with many real-world customer satisfaction datasets support these recommendations. ❑

[1] Hauser, John R., "Comparison of Importance Measurement Methodologies and Their Relationship to Customer Satisfaction", M.I.T. Marketing Center Working Paper 91-1, January 1991 (Cambridge, Massachusetts).

[2] Green, Paul E. and Tull, Donald S. Research for Marketing Decisions; 3rd edition; Prentice-Hall, Inc., 1975 (Englewood Cliffs, New Jersey), pp. 478-484.

READER SERVICE CARD 10/92

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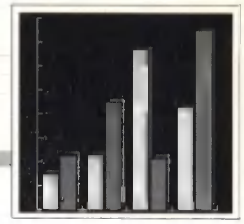

Poll shows widespread awareness of alcohol abuse warnings

The public has virtually universal awareness of the statements in proposed warnings in alcohol beverage advertising, according to a recent national Roper Organization opinion survey of adults and young people.

Anheuser-Busch Companies, Inc. commissioned the poll to test public knowledge of the proposed warnings and public opinion as to their effectiveness.

Of five warnings proposed in legislation pending before the U.S. Senate, 99% of Americans of all age groups said they already knew of the risks described in two of the warnings. The statements in two other warnings were known to 98% of the public, while the fifth warning was common knowledge to 97%, according to the poll. These levels of knowledge were very similar among adults and youths aged 14-20.

"The poll shows extremely high awareness of the information in the proposed warnings, among adults and young people alike," says Harry O'Neill, vice chairman of The Roper Organization. "Such high levels of awareness are very rarely found."

The survey also found that seven in ten of the total sample (73%) and of 14 to 20 year-olds (69%) believe that the warnings would not be effective in preventing alcohol abuse. In addition, of those Americans who drink, some 95% said that advertising did not influence their own decision to start drinking and does not affect how often or how much they drink.

"We are against alcohol abuse and illegal underage drinking—period," says Stephen K. Lambright, vice president and group executive of Anheuser-Busch Companies, Inc. "However, we are concerned about the application of measures supposed to combat abuse that are of no benefit. As this Roper survey shows, the proposed warnings would not tell people anything they don't already know—and the vast majority believe that ad warnings would not prevent abuse. The ad warnings approach should be rejected in favor of education, awareness, and law enforcement, which are already reducing abuse."

In its survey, Roper interviewed 1,202 people 14 years of age and older by telephone in late November 1991. Additional interviews were also conducted among 602 respondents aged 14-20, using the same questionnaire to allow for a larger sampling. A total of 738 interviews were conducted among the 14 to 20 year-old age group.

Following are the five statements included in the proposed ad warnings and the percent of all Americans, the percent of those 14-20 years of age, and the percent of those 21 and older who said they already knew of these risks associated with the abuse of alcohol:

"Alcohol impairs your ability to drive or operate machinery"—known by 99%

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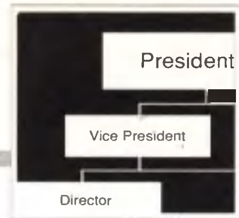


NAMES OF NOTE

Kate Freed, **Cyntbia Pausic**, and **Mary Scanlon** each hold the new position of senior marketing analyst with *Rubbermaid Inc.*, Wooster, OH.

James Kimbrough Jr. has been named director of finance & administration for *Johnston, Zabor & Associates, Inc.*, a marketing and communications research firm headquartered in Research Triangle Park, NC.

Mimi Nichols, president and owner of *Nichols Research, Inc.*, Sunnyvale, CA, has been elected 1992-1993 national president of the Marketing Research Association.

Nichols

Waller

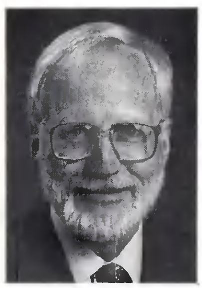
Scott Waller, has been promoted to account manager for telephone data collection at the *Quality Controlled Services (QCS)* division of Maritz Inc.

Lynn Spitzer has joined Media, PA-based *ICR Survey Research Group*, a division of AUS Consultants, as vice president, advanced research methodologies.

New York City-based *Meyers Research Center* has named **Frank Storm** director of client services.

Sanford Schwartz has been named president of *Market Facts*—New York. He will also hold the title of executive vice-president of *Market Facts, Inc*. In other Market Facts news, **Jeanine Smigielski** has been promoted to vice president at the firm's Chicago area office.

Smigielski



Glass

Richard E. Glass has been named an equity partner at *Market Decisions*, Cincinnati.

20/20 Research, Inc., Nashville, has named **Jnlia Miller** qualitative project director.

William Etter has joined St. Paul-based *Rockwood Research Corp.* as vice president/director of research.

Management Science Associates, Inc., a marketing analysis and computer software systems firm based in Pittsburgh, has named **Viv Penninti** CEO.

Brad Frevert has joined *Audits & Surveys* as vice president and director of its new Midwest office in Minneapolis. In addition: **Peter Salandra** has been promoted to associate director of the firm's National Total-Market Audit Division; **Isaac Behmoiram** has been promoted to vice president in the firm's Survey Division; **David Braverman** has resigned as president as Admar Research Inc. to rejoin Audits & Surveys as vice president and Survey Research Group head.

Evelyn Talismik Misner has joined *ACG Research Solutions*, St. Louis, MO, as a research project manager.

Talismik Misner

Hunter

John Hnnter has joined *Catherine Bryant & Associates, Inc.*, a marketing research firm in Winston-Salem, NC, as vice president-marketing.

Leo van Doorn has been appointed joint director of *MarketResponse Amersfoort*, The Netherlands.

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RESEARCH COMPANY NEWS

(Formerly "Start-Ups, Changes, Mergers & Acquisitions.")

Maritz Marketing Research Inc. has completed the acquisition of **D.H. Macey and Associates**, a Chicago-based consumer research firm specializing in mail panels. The company will continue its operations under its present name as a division of Maritz. Its principal, Daniel Macey, will head the division as vice president.

The Matrix Group has opened a new focus group facility in downtown Lexington, KY. The facility features a 14' x 18.5' focus room, and a 14' x 10' client viewing room with a 4' x 10' one-way mirror for viewing. The facility offers both audio and video taping capabilities. For more information call Martha Laing DeReamer at 606-272-8177.

The Market Lab has moved to new Long Island offices at 4 Laurel Avenue, Glen Cove, NY 11542. Phone 516-759-0300. Fax 516-671-6863. Contact Chris Ebel for more information at the number above.

Analytical Computer Service has moved to 414 Central Avenue, Westfield, NJ 07090. Phone 908-232-2723.

Mark Camack, formerly of NYNEX, one of the Regional Bell Operating Companies, and subsequently of St. Louis-based **Aragou Consulting Group**, has formed **The Corps Group**, a management and marketing consulting firm specializing in service-oriented industries. The firm will maintain offices in St. Louis and New York. For more information, call 314-725-0214.

Altamonte Springs, FL-based **Barbara Nolan Market Research Services, Iuc.** has opened two new focus group facilities. The first is located in the Feather Sound area near the Tampa airport. The room will feature a floor to ceiling mirror, viewing room for 12-15, client lounges, two video cameras. The second is located in suburban Orlando with similar amenities.

Strategic Mapping, Inc. has moved its corporate offices to 3135 Kifer Road, Santa Clara, CA 95051. Phone 408-970-9600. Fax 408-970-9999.

Nordhaus Research Inc. has opened a regional office in the Baltimore/Washington corridor at 504 South Hanover St., Baltimore, MD 20201. For more information contact Karen Motyka, 410-685-4070.

Five marketing research firms from the U.S. and Europe have formed an integrated network called **Group M International** to offer multi-country marketing research and consulting. The network's founding members are: Marketing Synergie International, Ltd., London; Kompass, Frankfurt; MSM, Paris; KJK International, Madrid; and Sweeney International, Ltd., Danbury, CT. For more information contact Timm Sweeney at 203-748-1638.

Superooms San Francisco has added a new toll-free telephone number which may be called from outside or inside California. The new toll-free number is 800-800-5055. Superooms is a division of **Consumer Research Associates.**

Informatiou Transfer Systems, Iuc. has moved to 209 E. Washington St., Suite 200, Ann Arbor, MI 48104-2007.

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PRODUCT & SERVICE UPDATE

Scanner data for liquor outlets now available

Promotion Information Bureau, Inc. (PIB) has introduced LiquorScan, a new marketing service for spirit, wine, and beer companies that utilizes the growing number of electronic scanners at check-out counters. PIB is a single-source marketing data company dedicated to the domestic spirits, beer, and wine industry. LiquorScan will provide analysis on a monthly basis of check-out counter scanner-sourced data transmitted from 600 retail liquor, food and drug store outlets in 12 major markets. Market coverage will be expanded in the near future. Consumer sales data will be transmitted to PIB by stores and will track unit and dollar shares, sales, and prices by SKU of all brands carried. PIB will analyze the data and provide each subscriber with a market by market, as well as national, report on the subscriber's own brand and those of all competitors. Reports will be furnished in print, disk, or electronic transmission. For more information contact Van Lefferdink at 203-855-8499.

StatPac update follows user suggestions

StatPac Inc. has released a new version of StatPac Gold IV, its survey and marketing research software. Version 4.3 adds a variety of user-requested features to the package. Many of the enhancements focus on improving report formats. New capabilities include the addition of footnotes, page numbering, a table of contents, switching to the landscape mode, and improved labeling in banner tables. Other enhancements concentrate on functionality, such as adding new analysis options, new commands to the programming language, and a more powerful report generator. The company also unveiled a new CRT interviewing module for disk-based surveys and other applications where the respondent enters his or her answers directly into the computer. For more information call 612-822-8252.

Census reports available on demographic trends

Urban Decision Systems, Inc. has released six new reports based upon the new 1990 census data. Combined with UDS's estimates and projections, this now gives businesses the opportunity to analyze demographic trends over a 27-year period. The new reports are: Demographic Trends (1970-1980-

1990), Income Trends (1970-1980-1990), Demographic Trends (1980-1990-1992), Income Trends (1980-1990-1992), Demographic Trends (1990-1992-1997) and Income Trends (1990-1992-1997). For more information, call Urban Decision Systems at 800-633-9568.

Software captures answers in respondents' voices

Creative Research Systems, publishers of The Survey System, a PC survey analysis package, have created a microcomputer-based voice capture interviewing package for survey research. Researchers using either telephone or in-person interviews can now record answers to selected questions in the respondents' own voices. The Survey System combines voice capture questions with the usual multiple-choice and fill-in-the-blank typed questions to make a complete interview. The Survey System can then combine both voice and typed answers to make a complete interview.

The Survey System can use demographic and other classifying questions to sort the voice captured answers during playback. Answers to a question about a consumer product could be sorted by sex, age, product usage and purchase intent. While hearing a comment, a researcher could see that the comment was made by a woman, 25-34 years old, who has young children and uses the product weekly. The same comments can be resorted in different ways as often as the user likes.

The user can assign numeric codes to the comments in order to group similar answers together during playback or to quantify the numbers of answers mentioning particular topics. For more information contact Hank Zucker or Bill Eaton at 707-765-1001.

Free white paper examines micro-geography

The changes in "micro-geography" and their significance to marketers and planners are explained by Claritas/NPDC in a new 20-page white paper. Titled DataBridge '92: The New Marketing Geography, it discusses the following topics:

- first-time availability of extensive demographic data for all census blocks in the U.S.
- 1980 to 1990 boundary-definition changes and their impact on marketing applications
- detailed, electronic street mapping capabilities from "TIGER"
- finer breaks in home-value and income data
- census vs. postal geography, and converting census demographics to postal geography
- how demographic data is updated between decennial censuses

The white paper is free and can be obtained by calling Claritas/NPDC at 800-284-4868.

New version of Axum increases graphics capabilities

TriMetrix, Inc. has released version 2.0 of Axum, a technical graphics and

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People's Bank
continued from p. 7

Vlahac conducts focus groups at the branch locations, usually once per quarter. "The branch manager pulls ten or twelve customers together to talk about whatever topic they want explored. I design a discussion guide and after we talk about bank policy issues the branch manager joins me to talk with them about customer service issues or anything they have on their minds, from parking to the ATM lobby, and they offer constructive suggestions. The customer gets into naming tellers or customer banking reps and talking about what they liked and didn't like about their service. It's good for the branch managers because it's a chance for them to sit down with a group of customers in a neutral environment."

Mystery shoppers

Complementing the bank's customer satisfaction research is its ongoing mystery shopper program. People's Bank's Judy Rogers: "We think it's an exciting program that adds to what the customer tells us through the direct surveys that Mary Ann does. We share information internally very freely. It's one thing to collect a lot of information and have it sit in a market research library, it's something else to make use of it."

The bank sends shoppers to People's Bank branches or has them call on the phone to inquire about bank services to measure branch employee performance in areas such as courteousness and product knowledge.

During pilot testing of the program, People's Bank employees from other branches served as the shoppers, but they were too demanding on their fellow workers, Rogers says. "In some ways, we found they were very hard on us. They knew so much about our business and our products that they picked up things the customer wouldn't pick up.

"This year we have switched to using professional shoppers that are the closest thing to real shoppers because there are no scenarios or contrived situations. We say to them, go to the bank looking for a product or service that you would use, everything from financing a car loan to refinancing a mortgage."

Big Brother

Rogers says the bank is careful to avoid giving employees the "Big Brother is watching" feeling that can result from a mystery shopping program. "It's not meant to be a springboard for punitive action, where we would say to them, you didn't do well on your shop. A copy of the shop is delivered to the branch so they can look at it and see where they did well and where they need to coach their staff on improving. It may be in a product knowledge area or it may be a very simple thing like smiling at the customer."

People's Bank has a set of service standards that employees must meet and through the mystery shop they are scored on their success in achieving those levels. "It's used as part of an incentive program. We recognize and reward based on the branch as a team, the success of the branch in achieving goals in sales, service, and profitability. They receive a quarterly incentive compensation," Rogers says.

That compensation, the bank hopes,

The benefits of customer retention research

by Paul C. Lubin

Editor's note: Paul Lubin is vice president and director, Consumer Research Division, Barry Leeds & Associates, Inc., New York City. This article originally appeared in Banker's Monthly magazine.

In today's deregulated banking environment, the sheer level of competition accentuates the importance of building and maintaining customer loyalty. Most banks have learned through experience that marketing programs aimed at improving customer retention help increase market share and product line revenues.

Banks have also come to recognize the need to conduct regular measurements of customer satisfaction. But in designing and conducting the research they often fail to discern the close links between service and product issues, and customer retention and revenues.

Instead, they assume that maintaining high levels of customer satisfaction will, by itself, ensure consumer loyalty. Bank marketing executives might better utilize their research budgets to identify and then improve performance on the issues which count—those which limit customer defections. Focusing resources on extending customer tenure especially among high balance relationships can have a powerful effect on revenues.

The table at right demonstrates the effect of limiting customer attrition for a medium-sized commercial bank in a northeastern city with 70 branches that recently dedicated a portion of its research budget to customer retention.

Once a customer retention strategy had been endorsed, the bank used market research to identify the "controllable" issues which best differentiate current and highly satisfied customers from consumers who have closed accounts and switched to another bank. Retention modeling was used to help identify and prioritize the factors which lead to customer discomfort and decisions to switch.

Gauging the financial impact of customor attrition in a typical bank

Size of branch network	70
Number of retail checking accounts per branch	1,785
Total number of retail checking accounts	124,950
Number of accounts closed per year (20%)	24,990
Product line defections (30%)	7,497
Annual checking revenues lost ($35 per account)	$262, 395
Annual revenue gain associated with limiting attrition among checking account customers	
10%	$26, 239
20%	$52, 479
30%	$78, 719
50%	$131, 197

By improving customer retention the bank not only increased current product income, it also guaranteed continuing revenue from each relationship retained. The future revenue stream can then be discounted back to the present, in order to calculate the present value of saved relationships.

In this example, the bank found that such factors as employee decision-making ability; efficient and competent tellers; competitive rates; sympathetic and friendly customer service staff; and adequate explanations of rules, policies and minimum balance requirements strongly influenced customer migration.

The model was then compared to the bank's customer base and the proportion of current customers with attitudes similar to former customers was determined. About one-quarter of the bank's customer base was found to be "at risk," because their attitudes were similar to customers who had already closed accounts.

The "at risk" customers were then profiled in terms of their demographic characteristics. They were typically younger and well educated, but with smaller deposit balances. The "at risk" group was also profiled by county. It turned out that in a single suburban area customers were particularly dissatisfied.

Armed with these findings, the bank could then focus its efforts on addressing the concerns of the "at risk" groups.

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will mitigate the unpredictable human element that is always present in a service situation. Employee motivation can wane in the face of a bad day, and if a customer interacts with an employee on that day, the experience can color the customer's impression about the company. "You try to cultivate the kind of situation where the customer has a really good experience and can go away feeling good about themselves and about your organization. That's not always easy to achieve. In the real world, we all have difficult days and keeping people up and motivated and keeping the level of service up is quite a trick. We think that the mystery shopper program helps us with that," Rogers says. ❑

Retention Research

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Getting down to cases

Why do customers close their accounts? It is extremely important that research be designed to uncover the "actual" events and experiences which cause consumers discomfort and make them decide to transfer funds elsewhere. Extensive probing into the underlying causes of closed accounts can help management link product and service issues with lost accounts and product line revenues.

In a study conducted for a commercial bank in the South with over 150 branches, a large proportion of customers who switched said they left for one of two reasons: because of the staff or because of limited access to the bank's services.

Further probing of the group who complained about the staff revealed the issues to be specifically related to employee empowerment. Respondents also felt that bank employees did not sufficiently respect the customer's tenure and there was a particular aspect of telephone banking that bothered them.

It turned out that many of the bank's own policies prevented employees from presenting an image of caring both over the phone and in person, and a large proportion of defections involved customer perceptions that the bank was "impersonal."

Another large group of relatively affluent former customers said their decision to close their accounts was influenced by branch hours.

Initial research also showed that still another sizable group of customers said they closed their accounts because of high fees, particularly those who were new to the bank. Further investigation, however, found that some of these customers had been simply unaware of the charges and deemed them inappropriate.

Based on such findings, the bank in this example might well have also researched the role of its service delivery system. Employee group interviews are extremely helpful in identifying problems that hinder front-line performance. Many customer defections are influenced by the system under which employees operate and this manifests itself to the customer in the form of staff indifference and incompetence. Changes in the service delivery system can help improve staff performance and limit customer migration.

Instituting change

Once the issues surrounding customer attrition are fully explored, effective customer retention programs can be developed. Based on the research, specific service and product refinements can be targeted to retaining accounts.

As a result of one study, for example, it was suggested that branch personnel be given more flexibility to make decisions, particularly with regard to check clearing. Priority was to be given to longstanding customers with high balances.

Based on this research, it was also suggested that the routine procedures for processing loan and credit applications be modified for certain high revenue and self-employed customers. Extending branch hours in "A" type, high deposit branches was also recommended.

Estimates of the number of accounts that could be saved, given these changes, were calculated based upon the information gleaned from customer retention research. The bank viewed these refinements as investments in future revenue streams and also used "time/value of money" calculations to help determine the merit of these changes.

Tracking where the money is going

Customer retention research also helps the bank marketer trace where the money is going, which competitors are taking customers and what their strategies are. Armed with this information banks can adopt strategies aimed at preventing customer migration.

A well known regional bank in a mid-Atlantic state found that its money market customers were taking their money out and switching to mutual funds, chiefly because of rates. Once there, the customer valued the service and investment diversity of the mutual fund company more than the safety offered by their bank.

This research finding prompted the bank to take a more aggressive stance against fund disintermediation, because it can lead to a deterioration in the relative value of the customer relationship. It was incorrect for the bank to assume that the money would eventually come back when rates rose.

Once a customer retention program is underway, resources should be allocated to updating the research periodically and measuring the effect of the program. Customer attrition tracking helps marketers systematically measure the rate of product line defections and gauge retention programs against goals. Such information provides constant feedback on the actual causes of closed accounts and provides bank management with a tool for continually refining service and products.

Traditional customer satisfaction tracking programs should also be refocused in order to measure and track the size of the customer base "at risk." This measure can be included along with other performance assessments in management's scorecard.

Increases in the numbers of "at risk" customers should be seen as "red flags" of customer migration and declines in product line revenues. Areas that show deteriorating customer satisfaction can be identified and targeted for improvement.

Many banks recognize the value of obtaining current customer feedback. But they fail to realize that former customers can provide the missing ingredient for a program dedicated to improving customer loyalty and revenues. Once former customers are included, the bank can build a profit-oriented service and product quality strategy as a means toward retaining customer relationships.❑

American Express

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ees to discuss the customer satisfaction information, Gross says. "We have hundreds of offices around the country, so it's hard to get out and chat with everybody. But it's essential for support groups like ours, and our consultants and researchers, to work directly with operations. Before we talk research and numbers, we ask what they are hearing and what they feel the issues are. Then we actively participate in the improvement process. It helps keep us down to earth."

Those dealing with business travel receive quarterly reports; those in the membership travel offices get reports twice a year. The Travel Service offices receive a report with information specific to their location, some national benchmarks and national averages. Offices are also shown how they scored in comparison to other offices of similar size and type. "We've learned a couple of things: the benchmarks have to be relevant," Gross says. "For example, if they're a small office, and they feel that there's a natural advantage to being big, or vice versa, they'll ignore their results. We want people to reach. We'd like them to say gosh I'm at an 80 and the best person in the country who's just like me is a 99, I can do it."

> *"I think customer satisfaction research is here to stay in the companies that probably need it least. These companies are already in close touch with their customers, they have an emphasis on continually improving the way they work and their first commitment is to their people."*

Rather than make customer satisfaction/service quality results a basis for punitive action against employees, they should be used to set business objectives and as an incentive for improvement. At American Express Travel Related Services, customer satisfaction levels influence employee incentives and bonuses. "If you don't score on customer satisfaction, you don't earn. It's a basic requirement," Gross says.

Wrong reasons

Customer satisfaction, service quality, total quality management—call it what you will, it's all the rage right now in U.S. business. Some companies might be getting into it because it's hot, or because everyone else is doing it. But those are the wrong reasons, Gross says. "If you're not able to tie it to the bottom line, you shouldn't be making the investment. Save your time and money until you're ready. That's smart business. Smarter business is to take customer satisfaction information and use it, because it's incredibly powerful.

Circle No. 218 on Reader Card

"I think customer satisfaction research is here to stay in the companies that probably need it least. These companies are already in close touch with their customers, they have an emphasis on continually improving the way they work and their first commitment is to their people."

Another stumbling block for companies looking to implement a service quality program can be difficulty in making customer satisfaction part of the corporate culture. Either because of bureaucracy or employee skepticism, many firms can't fully embrace the quality gospel—and that usually spells failure for any fledgling customer satisfaction efforts.

BAI's Richard Reiser: "There are going to be a lot of companies that get dissatisfied with the way they're doing customer satisfaction work as the numbers don't change and their ability to use the data as a managerial tool doesn't seem to work because they've been dealing with generalities. Some will get dissatisfied and stop. Some will move on to more sophisticated measures.

"You can't design a process that's just going to be a senior management report on the happiness of the customers. It has to be designed as something that can be used at every level of the company, so that people at every level of the company can see the importance of what they do relative to what the customer experiences."

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Gross says that customer satisfaction research has been successful at American Express because the company has been clear about what its main goal is. "Customer satisfaction research and the customer orientation of our business is a fundamental principal of our company. We believe that we serve three constituencies: the external customers, our employees, and our shareholders. All of our management goals are now organized to those three constituencies. We believe that we as management should be creating employee satisfaction, that happy, motivated people on the front lines armed with efficient work processes and support will create delighted customers, and that this leads to increased profits and better margins. And the cornerstone of all this is having a clear read on what matters to customers." ❑

Survey Monitor

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of all three groups.

"Drinking during pregnancy may cause birth defects. Women should avoid alcohol during pregnancy"—known by 98% of all those polled, by 99% of 14-20 year-olds, and by 99% of 14-20 year olds, and by 98% of those 21 and older.

"Alcohol may be hazardous if you are using certain kinds of over-the-counter prescriptions, or illegal drugs"—known by 97% of all persons sampled, 94% of those 14-20 years of age, and 98% of all adults.

"Drinking alcohol may become addictive"—known by 98% of those polled in each group.

"It is against the law to purchase alcohol for persons under age 21"—known by 99% of all those sampled, 98% of the adults and 100% of those under 21.

The survey also asked members of the public about the effectiveness of the proposed warnings in alcohol advertising. Again, the results were consistent across age categories, with seven in ten finding them ineffective in reducing abuse. Breaking the categories down, 73% of the total sample, 69% of 14 to 20 year-olds, and 73% of those 21 and older said the warnings would not reduce abuse.

One of the key reasons that people don't believe warning labels will work to reduce alcohol abuse may be that more than three-fourths (77% of all those sampled and 79% of those aged 14 to 20) feel that if someone is already aware of the possible dangers of using a product, then those people "aren't likely to pay attention" to warnings.

Also released were statistics regarding the effect of advertising on Americans' alcohol consumption practices. Only 4% of all those who drink said that advertising influenced their original decision to start drinking, while just 3% said that advertising influences how often they drink or how much they drink.

Aging population will affect insurance industry

Changing demographic trends in the United States will dramatically affect the insurance industry in coming years, according to a new study by Conning & Company, a Hartford, CT-based investment and research company specializing in the insurance industry.

"Insurance products will be affected in different ways and to varying extents, however," says Carl Copp, Conning vice president. "For example, annuities and health insurance products should benefit greatly because our aging population means more people will be accumulating assets for retirement and incurring higher medical expenses.

"On the other hand, the significant downward trend in household formations (517,000 in 1990 vs. a rate of 1.3 million in the 1980s) will have a negative effect on the homeowners' insurance market," Copp says.

An area with enormous potential, according to the study, is long-term care. Copp says two out of five people over 65 will at some time require nursing home care, and so far, only one percent of the $50-billion spent annually on long-term care is being financed by insurance. He says older people spend twice as much on health care as those under 30 and the number of Americans over 65 will increase almost twice as fast as the general population in the 1990s. The number of very aged (over 85) will jump 42 percent.

Copp notes that demographic changes will affect primarily personal insurance markets because commercial lines are considerably more influenced by competition, rate levels, tort system changes and regulation.

Copp says the major demographic trends that will affect the insurance industry in the next ten years are:

- An aging population
- Slowing population and economic growth
- Increasing health care costs.

The Conning study, "Demographics: Changing Demands for Insurance Products," explores changes in the U.S. population growth curve; changes in the social fabric and economic outlook for the country; shifts in income, wealth and spending; and the insurance products most likely to be affected by these demographic trends.

Study finds less clutter on Spanish TV

The results of a month-long study of advertising clutter on Spanish- and English-language network television has revealed there is substantially less advertising clutter on Spanish-language television, thus meaning a better value for the Spanish-language advertiser. The study was conducted by Market Development, Inc. (MDI), a San Diego-based firm specializing in research among U.S. Hispanics.

From March 17 through April 15, 1992, MDI recorded and logged every commercial/spot that aired during prime time on a randomly selected television network, including English-language ABC, CBS, and NBC, and Spanish-language Univision and Telemundo. In this case, prime time was defined as 7-10 p.m. to include the greatest amount of time commonly considered prime time by English- as well as Spanish-language media. Over the course of the study, the prime-time commercials aired on each of the five networks were recorded six times for a total of 18 hours of commercial screenings.

Having recorded a grand total (national and local) of 3011 commercials/spots during the 30-day period, the MDI study showed that 1951 were English-language commercials, while 1060 aired in Spanish. On an hourly basis, an average of 33 percent fewer commercials/spots aired in Spanish (21) than English (32) on national network television. Looking solely at the number of commercials aired for nationally or regionally branded products or services, the three English-language networks showed an average of 18 commercials per hour, as opposed to the nine commercials per hour aired by the two Spanish-language networks. For nationally or regionally branded products/services, therefore, twice as much ad clutter exists on English-language television.

"This relatively uncluttered message environment suggests that a message would have a far better chance of impacting on its potential target audience in Spanish media," says Dr. Henry Adams, executive vice president of MDI. "On average, a branded product should get at least double the 'bang for its buck' in Spanish than it does in English since there are half as many commercial messages with which to compete for the viewer's attention."

The study also revealed a clear difference in the composition of ad clutter across two media. In English, five major categories represent over half of the ad clutter, with clear dominance by automobiles (22%). Cosmetics and toiletries, quick-service restaurants, and over-the-counter drugs each accounted for nine percent of English-language ad clutter, while retail stores and chains had eight percent.

Conversely, Spanish-language ad clutter is more evenly distributed, and across different categories. Prepared foods had the greatest share of Spanish-language ad clutter (16%). Autos and telecommunications tied at 12 percent, followed by retail stores and chains, and cosmetics and toiletries, each with 11 percent.

Names of Note

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Langhorne, PA-based *ICT Group*, a provider of telephone marketing and market research services, has named **Steven Cosentino** vice president of operations.

Laverne M. Price has been promoted to research officer at *Teachers Insurance and Annuity Association-College Retirement Equities Fund*, New York City.

Cobourn

Allan

Judy Cobourn and **Crystal Allan** have been promoted to the position of account executive at *Chilton Research Services*, Radnor, PA.

he Matrix Group, a Lexington, KY-based research firm, has named **Molly Sweazy Burlew** project manager.

Karen Motyka will manage the new regional office of *Nordhaus Research, Inc.* in Baltimore.

Gary Cunningham has joined *Aspen Research, Inc.*, Coral Gables, FL, as research associate.

After an extended illness, **Al Amidei** has returned to *Ask Southern California, Inc.* as executive vice president. In addition, **Jon Marshall** has been promoted to vice president of sales and marketing, and **Jennifer Kerstner** has been promoted to vice president of operations at the Orange, CA firm.

George Szybillo has joined *Simmons Market Research Bureau*, New York City, vice president/technical director for syndicated studies.

Randy Thompson has joined the multiclient studies group of *Doane Marketing Research* as new project director. In addition, **Greg Malcom** joins the St. Louis-based firm as research associate.

James Spaeth has joined *ASI Market Research*, New York City, as executive vice president-ventures.

Douglas Collier has been promoted to senior account representative at *Ruf Corporation*, Olathe, KS, for its new product TRW/Ruf Business Clusters.

Collier

Neiheisel

Thomas Neiheisel is president and owner of *Youth Marketing Solutions*, a new Cincinnati-based marketing research and consulting firm specializing in children, teenagers, their parents, and young adults.

Joe Jesuele has joined *Target Research Group Inc.*, Spring Valley, NY, as principal and executive vice-president.

Chicago-based *Creative & Response Research Services, Inc.* has announced several staff promotions and additions. Promoted: **Diane Addabbo** and **Ed Schneider** to vice president; **Adina Ben-Zeev** to project coordinator. Hired: **Tracy Shapey** will start a new division of the firm specializing in the process of creating ideas for clients; **Stu Romm** as research analyst; **Lynn Johnson** as manager of Idea Development Services; **Amye Rusdorf** has joined the Coding Department; **Lisa Zielenko** and **Ina Miery Teran** as associate account execs; **Melissa Rhodes** as project coordinator.

Laura Roggi has been named president and chief operating officer of *Lieberman Research Suburban*, White Plains, NY. In addition, **Elana Hudak** has been promoted to vice president, business development; **Julie Vreeland** has been promoted to vice president, research director; and **Annette Weiss** has been promoted to vice president, client services. **Diane Parus** and **Lisa Hughes** have joined the firm as vice president, client services.

Jim Timony has joined *Bruskin/Goldring Research* as account executive.

Schulman, Ronca & Bucuvalas, Inc., a New York City-based public opinion and market research firm, has added **Lisa Spielman** as a senior analyst and **Roseana Zanazzi** as an assistant project director.

Richard Cottrell has joined the Toledo, OH-based *Automotive Research Group of Maritz Marketing Research Inc.* as director of telebusiness programs.

Catherine "Mickey" McRae has joined *Alliance Research, Inc.*, Crestview Hills, KY (Greater Cincinnati), as director of qualitative research.

Jim Steber has joined *DataSource*, Indianapolis, as vice president of data collection.

Research Company News

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Phone 313-994-0003. Fax 313-994-1228.

Princeton, NJ-based **Total Research Corporation** has formed an alliance with **Qnality Improvements** (Qi), a Swiss-based strategic quality management consulting firm. Qi will serve as a liason for clients of Total Research, providing local coordination and facilitation of activities involving Total Research's quality management and customer satisfaction research capabilities.

Indianapolis-based **Walker Research, Inc.** is now doing business under the new trade name, **Walker Group.**

Target Research Group Inc. has moved to new offices at 150 Airport Executive Park, Spring Valley, NY 10977.

Coleman Research has moved to new offices at 2209 Century Dr., Ste. 500, Raleigh, NC 27612-3960. Phone 919-790-0000.

Survey Research Group (SRG), an Asian market research organization, has joined the CSM Worldwide network as its tenth member. The SRG Companies joining the network include: Survey Research Hong Kong, Survey Research Indonesia, Survey Research Malaysia, Survey Research Singapore, Survey Research Taiwan, Deemar Company (Thailand), Hankook Research (Korea), Pulse Research Group (The Philippines), SRG China. The CSM Worldwide network is an organization dedicated to measuring and improving customer satisfaction and quality on a global level. For more information contact Larry Crosby at 602-831-2971.

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fied to the recruiter. All of the elements of the recruit (cost of mailing, projected return rate, projected incidence of qualified respondents, cost of telephone contact if time to invite by mail is not sufficient, incentive level, etc.) are broken out in the bid specification. This way, if the assumptions are incorrect, the client (we) will pay the extra cost. The assumptions are then altered for the next study, and over a period of time, the client becomes much more accurate in predicting all of the cost-related variables. The important concept here is that the recruiter is never put in a position of having to deliver a set number of "warm bodies" for a set price. The pressure to deliver quantity rather than quality is greatly reduced or eliminated.

These are just a few examples of how the client can affect higher quality recruiting by taking responsibility for a higher level of professional participation in the process of conducting marketing research.

David P. Bostwick
Director, Business Planning & Research
Chrysler Corporation
Highland Park, MI

Many chnrches do research

Your June/July "Trade Talk" section on Rosewood Church was quite interesting (as is the entire publication, generally). In the article, you quoted Pastor Kauffman as saying that "I don't know of any other church that has done a survey of their congregation to this extent." I thought you might be interested to know that there are actually quite a number which have. In fact, many of these churches have worked with us on research that extended far beyond the congregation, into the community.

We've conducted qualitative studies for churches ranging from the (at that time) 40-person Knox Presbyterian Church in California, to the 15,000-person Willow Creek Community Church in Illinois. These studies have included using secondary data, congregational surveys, and full-blown primary studies of the community surrounding the church.

Thanks for an enjoyable and helpful publication. Just thought you'd like to stay on top of some of the work that's being done within our industry.

Ron Sellers
Projeet Director
Barna Research Group
Glendale, CA

Place
Postage
Here

Quirk's
MARKETING RESEARCH
Review

P.O. Box 23536
Minneapolis, MN 55423

Product & Service Update

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data analysis package for PCs. The newest version of Axum allows users to automate repetitive graphing and data analysis tasks with batch processing capabilities. These batch programs can be written automatically by Axum and can be used to control Axum from other programs. In addition, Axum 2.0 offers all-new automatic axes scaling and intelligent tick placement methods that allow users to create publication-quality graphs.

Axum 2.0 offers major advances in 3D, 2D, and contour plotting. Users can now use unlimited-sized data sets to produce 3D mesh surfaces, which can be filled with varying colors. Stacked 3D contours can be created for both gridded or irregularly spaced data. Enhanced 2D graphing capabilities include additional curve fitting plot types and labeled scatter plots. Users can also choose from PostScript fonts in addition to the 22 built-in fonts when annotating their graph. New supported graphics export file types include TIFF, Color PostScript, and HPGL2.

The program's data editor now lets users sort multiple columns of data of any size. In addition, users can perform operations on blocks as well as columns and rows. A function evaluation menu has been added, allowing users to evaluate arbitrary functions. The new version automatically uses EMS, XMS, and the high memory area and requires less memory to run (420K). For more information call 800-548-5653.

Forms processing package reads boxes, text

A new forms processing software package, ALEX-FORM, has been introduced by A.L. Systems, a London-based software company. The program processes check boxes at 150 per second and will automatically OCR any clearly printed or typewritten text on the form at 360 words per minute. Handwriting cannot be accurately OCR'd. ALEX-FORM displays the words on the screen in the relevant location. It ensures that the data goes in the corresponding field. The operator just has to transcribe the handwritten characters correctly. If a handwritten box is empty, the program detects this and skips over it. For more information contact A.L. Systems' U.S. representative, Martin Russell, at 415-381-0574.

Version 1.2 of EZREPORT

Raosoft EZREPORT version 1.2 is a DOS-based report writer that lets users produce custom reports from any dBASE-type database. It will run on single or multiple floppy or hard disk drives and needs 512K memory, DOS 2.0 or higher. It is networkable and can run under the Windows environment. There is no limit to the database size that it can work with except system capacity. The software features an intuitive command structure, which is characterized by its reduced command set in straightforward English words. EZREPORT will support all types of periodic report preparation. It will provide additional capacity to users of Raosoft SURVEY, version 2.0, such as allowing for comparison of survey results over different time periods. For more information, call 206-525-4025.

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.

ADI Research, Inc.
(See Matrixx Marketing)

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

The Answer Group
4665 Cornell Rd., Ste. 150
Cincinnati, OH 45241
Ph. 513-489-9000
Contact: Lynn Grome
Consumer,HealthCare,Prof., Focus Groups,One-On-Ones.

Answers Research
225 Stevens Ave., Ste. 108
Solana Beach, CA 92075
Ph. 619-792-4660
Contact: David Farlow
Business-to-Business, Hi-Tech, Medical, New Product, Biotech.

Auto Pacific Group, Inc.
12812 Panorama View
Santa Ana, CA 92705-1340
Ph. 714-838-4234
Contact: George Peterson
Auto Marketing & Product Experts. 700+ Groups Moderate & Recruit.

Brand Consulting Group
17117 W. Nine Mile Rd./Ste. 1020
Southfield, MI 48075
Ph. 313-559-2100
Contact: Milton Brand
Consumer,Advertising Strategy, New Product Strategy Research.

Brittain Associates, Inc.
3400 Peachtree Rd., Ste. 1015
Atlanta, GA 30326
Ph. 404-365-8708
Contact: Rhonda Davidson
10 Years Moderating For Financial Services Industry.

Chamberlain Research Consultants
12 East Olin Ave.
Madison, WI 53713
Ph. 608-258-3666
Contact: Sharon Chamberlain
Full-Service Marketing Research/ Business & Consumer Studies.

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

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

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

Creative & Response Svces., Inc.
500 N. Michigan Ave., 12th Fl.
Chicago, IL 60611
Ph. 312-828-9200
Contact: Sanford Adams
Thirty Years of Leadership in Qualitative Research.

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

Daniel Associates
49 Hill Rd., Ste. 4
Belmont, MA 02178
Ph. 617-484-6225
Contact: Stephen J. Daniel
FOCUS/IT Understanding the High Tech Buying Process.

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

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

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

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

Find/SVP
625 Avenue of the Americas
New York, NY 10011-2002
Ph. 212-645-4500 x208
Contact: Ann Middleman
Mktg Consulting & Rsch. Health Care, Telecomm., & Technology.

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

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

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

Focus On Kids
327 Papin Avenue
St. Louis, MO 63119
Ph. 314-963-1902
Contact: Alan Burns, Ph.D.
Kid/Mom Specialist; New Concepts/Products/Advertising.

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

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

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

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

GRM & Associates
8807 Kingston Pike, # East E
Knoxville, TN 37923
Ph. 615-693-3500
Contact: Christopher Wise
Quality Focus Facility/Recruit by Lifestyle Groups.

Hammer Marketing Resources
179 Inverness Rd.
Severna Pk. (Balt./D.C.), MD 21146
Ph. 410-544-9191
Contact: Bill Hammer
23 Years Experience - Consumer, Business & Executive.

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

Horowitz Associates
2 East Avenue
Larchmont, NY 10538
Ph. 914-834-5999
Contact: Howard Horowitz
Cable/Video Marketing-Programming-Advertising Strategy.

iNFOCUS Group Services
5101 Cleveland St., #304
Virginia Beach, VA 23462
Ph. 804-490-1351
Contact: Grace Fuller-Stanton
Full Qual. & Facility. Consumer & Bus-to-Bus. Training. Seminars.

Intersearch Corporation
132 Welsh Rd.
Horsham, PA 19044
Ph. 215-657-6400
Contact: Robert S. Cosgrove
Pharm.-Med./High-Tech/Bus.-to-Bus./Consumer/Telecomm.

Johnston, Zabor & Ascts., Inc.
P. O. Box 12743
Rsch. Tri. Park, NC 27709
Ph. 800-544-5448
Contact: Jeffrey M. Johnston
Comp. Capabilities. New Prod./ Svce./Cust. Satis./Comm. Rsch.

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

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

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

Leichliter Associates
252 E. 61st St., Ste. 2C-S
New York, NY 10021
Ph. 212-753-2099
Contact: Betsy Leichliter
Innovative Exploratory Rsch./Idea Development. Offices NY & Chicago.

Lubavs Qualitative Research
2116 Aberdeen
Kalamazoo, MI 49008
Ph. 616-381-7239
Contact: Aija Lubavs
Moderator/In-Depth Interviewer Mktg. & Psychology Experience.

Management Research & Planning Corp.
303 Blake St., #200
Raleigh, NC 27601
Ph. 800-347-5608
Contact: John Watkins
FORT.100 Elec., Comp. , Int'l. Food & Chem., Pol., Sprts., Pub.,Cons. Pdcts.

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

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

Mature Marketing Research Div.
Consumer Sciences, Inc.
245 Federal Rd., Ste. B-22
Brookfield, CT 06804
Ph. 203-797-0666
Contact: Dr. Leslie Harris
Reg., Nat'l. Studies. Full Svce. Qual. & Quan.

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

PACE, Inc.
31700 Middlebelt Rd., Ste. 200
Farmington Hills, MI 48334
Ph. 313-553-4100
Contact: Peter J. Swetish
Full Service Vehicle Specialist-OEM & Aftermarket Experience.

Research Data Analysis, Inc.
450 Enterprise Court
Bloomfield Hills, MI 48302
Ph. 313-332-5000
Contact: Sanford Stallard
Full Svce. Oual./Quan. Analysis/ Auto./Adv./Comm.

Research In Marketing, Inc. (RIM)
508 Central Avenue
Highland Park, IL 60035
Ph. 708-433-8383
Contact: Larry Hammond
Unsurpassed Ouality, Competitive Pricing.

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

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

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

Pamela Rogers Research
2525 Arapahoe Ave., #E4-174
Boulder, CO 80302
Ph. 303-494-1737
Contact: Pamela Rogers
Environmental Issues-Healthy Food/Products/Packaging.

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

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

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

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

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

Strategic Research, Inc.
4600 Devonshire Common
Fremont, CA 94536
Ph. 415-797-5561
Contact: Sylvia Wessel
400 Groups, Hi-Tech/Medical/ Financial/Transportation Svcs.

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

Thorne Creative Rsch. Svces.
65 Pondfield Rd., Ste. 3
Bronxville, NY 10708
Ph. 914-337-1364
Contact: Gina Thorne
Ideation, teens, New Product Ad Concepts, Package Goods.

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

TrendQuest
16959 Bernardo Ctr. Dr., #216
San Diego, CA 92128
Ph. 619-674-1031
Contact: Ann C. Klimowicz
Health Care: Focus Groups, In-Depth One-on-Ones.

Venture Marketing Ascts, Inc.
3845 Viscount, Stes. 3 & 4
Memphis, TN 38118
Contact: Lawrence Berry
Hispanic, Medical, H & BA, Food, Business-To-Business.

Visual Research Communications, Inc.
441 Main St.
Metuchen, NJ 08840
Ph. 908-906-6556
Contact: Ricardo A. Lopez
10 Yrs. Exper. in Hispanic Mkt. Bi-ling., Focus Grp. Anywhere in U.S.

Dan Wiese Market & Research Direction
2108 Greenwood Dr. S.E.
Cedar Rapids, IA 52403
Ph. 319-364-2866
Contact: Dan Wiese
Highly Experienced: Farmers, Consumers, Buisiness.

Youth Research/CSi
65 East India Row, Apt. 7F
Boston, MA 02110
Ph. 617-720-6060
Contact: Karen Forcade
Consultants in Marketing to Children and Teens.

Geographic and specialty indexes on next page

STATE CROSS INDEX OF MODERATORS

Refer to Preceding Pages For Address, Phone Number and Contact Name

SPECIALTY CROSS INDEX OF MODERATORS

Refer to Preceding Pages For Address, Phone Number and Contact Name

First Market Rsch. (L. Lynch)
D.S. Fraley & Associates
Intersearch Corporation
Kennedy Research Inc.
Management Rsch. & Plng. Corp.
Rodgers Marketing Research
Thorne Creative Research

ENTERTAINMENT

D.S. Fraley & Associates
Sweeney International, Ltd.

ENVIRONMENTAL

Pamela Rogers Research

EXECUTIVES

Chamberlain Rsch. Cnsltnts.
Creative & Response Rsch. Svcs.
Dolobowsky Qual. Svcs., Inc.
First Market Rsch. (J. Heiman)
iNFOCUS Group Services
Intersearch Corporation
Kennedy Research Inc.
PACE, Inc.
James Spanier Associates
Sweeney International, Ltd.

FINANCIAL SVCS.

Brittain Associates, Inc.
Creative & Response Rsch. Svcs.
Dolobowsky Qual. Svcs., Inc.
First Market Rsch (L. Lynch)
Intersearch Corporation
Matrixx Marketing-Research Div.
The Research Center
Research In Marketing, Inc.
Rockwood Research Corp.
Southeastern Institute of Rsch.
James Spanier Associates
Sweeney Int'l. Ltd.

FOOD PRODUCTS

Creative & Response Rsch. Svcs.
Doyle Research Associates
D.S. Fraley & Associates
Leichliter Associates
James Spanier Associates
Thorne Creative Research
TrendFacts

HEALTH & BEAUTY RODUCTS

The Answer Group
D.S. Fraley & Associates
Thorne Creative Research

HEALTH CARE

Chamberlain Rsch. Cnsltnts.
Creative Marketing Solutions
Dolobowsky Qual. Svces., Inc.
D/R/S HealthCare Consultants
Find/SVP
First Market Rsch. (L. Lynch)
Intersearch Corporation
Kennedy Research Inc.
Market Navigation, Inc.
Matrixx Marketing-Research Div.
MedProbe Medical Mktg. Rsch.
Research In Marketing, Inc.
Southeastern Institute of Rsch.
James Spanier Associates
TrendQuest

HISPANIC

Analysis Research Ltd.
Hispanic Marketing
Communication Research
Visual Rsch Comm., Inc.

IDEA GENERATION

Analysis Research Ltd.
Brand Consulting Group
Creative & Response Rsch. Svcs.
Dolobowsky Qual. Svcs., Inc.
D.S. Fraley & Associates
Leichliter Associates
Matrixx Marketing-Research Div.
Sweeney International, Ltd.
Thorne Creative Research

INDUSTRIAL

First Market Rsch. (J. Heiman)
Intersearch Corporation
Kennedy Research Inc.
Market Navigation, Inc.
Strategic Research, Inc.
Sweeney International, Ltd.

MEDICAL PROFESSION

Answers Research
Creative Marketing Solutions
D/R/S HealthCare Consultants
Intersearch Corporation
Matrixx Marketing-Research Div.
Medical Marketing Research, Inc.
MedProbe Medical Mktg. Rsch.
Research In Marketing, Inc.
Strategic Research, Inc.

MODERATOR TRAINING

Cunninghis Associates

NEW PRODUCT DEVELOPMENT

Answers Research
Brand Consulting Group
Creative & Response Rsch. Svcs.
Creative Marketing Solutions
Daniel Associates
Dolobowsky Qual. Svcs., Inc.
D.S. Fraley & Associates
First Market Rsch. (J. Heiman)
Intersearch Corporation
Leichliter Associates
Management Rsch. & Plng. Corp.
Research In Marketing, Inc.
Southeastern Institute of Rsch.
James Spanier Associates
Strategic Marketing. Svces.
Youth Research/CSi

PACKAGED GOODS

The Answer Group
Creative & Response Rsch. Svcs.
Doyle Research Associates
D.S. Fraley & Associates
Thorne Creative Research

PARENTS

Doyle Research Associates

PET PRODUCTS

Rockwood Research Corp.
Thorne Creative Research

PHARMACEUTICALS

The Answer Group
Creative & Response Rsch. Svcs.
Creative Marketing Solutions
D/R/S HealthCare Consultants
Intersearch Corporation
Johnston, Zabor & Associates
Market Navigation, Inc.
MedProbe Medical Mktg. Rsch.
Research In Marketing, Inc.
James Spanier Associates
TrendQuest

POLITICAL RSCH.

Chamberlain Rsch. Cnsltnts.
Management Rsch. & Plng. Corp.

PUBLIC POLICY RESEARCH

Leichliter Associates

PUBLISHING

First Market Rsch. (J. Heiman)
D.S. Fraley & Associates
iNFOCUS Group Services
Thorne Creative Research

RETAIL

Brand Consulting Group
First Market Rsch. (L. Lynch)
iNFOCUS Group Services
Research In Marketing, Inc.

SENIORS

Mature Marketing Research Div.
Research In Marketing, Inc.

SOFT DRINKS, BEER, WINE

Creative & Response Rsch. Svcs.
Grieco Research Group, Inc.
Thorne Creative Research

TEACHERS

D.S. Fraley & Associates

TEENAGERS

Creative & Response Rsch. Svcs.
Doyle Research Associates
D.S. Fraley & Associates
Matrixx Marketing-Rsch. Div.
Thorne Creative Research
Youth Research/CSi

TELECOMMUNICATIONS

Answers Research
Creative Marketing Solutions
Cunninghis Associates
Find/SVP
First Market Rsch. (J. Heiman)
Horowitz Associates, Inc.
iNFOCUS Group Services
Intersearch Corporation
Kennedy Research Inc.
Southeastern Institute of Rsch.

TELECONFERENCING

Rockwood Research Corp.

TELEPHONE FOCUS GROUPS

Answers Research
Creative & Response Rsch. Svcs.
Intersearch Corporation
Market Navigation, Inc.

TOYS/GAMES

Youth Research/CSi

TRANSPORTATION SERVICES

Sweeney International, Ltd.

TRAVEL

Sweeney International, Ltd.

UTILITIES

Chamberlain Rsch. Cnsltnts.

YOUTH

Doyle Research Associates
D.S. Fraley & Associates
Youth Research/CSi

Quirk's
MARKETING RESEARCH
Review

1992 Directory of Customer Satisfaction Research Providers

Editor's Note: This list was developed by perusing leading publications for research firms who indicated specialization in customer satisfaction studies. Listing forms were sent to principals of these companies. Those who returned the forms are included in this directory.

Lee Abrahamson & Associates
2915 SR 590, Ste. 21
Clearwater, FL 34623
Ph. 800-765-3343
Lee Abrahamson, Pres.

ACG Research Solutions
120 S. Central Ave., Ste. 1750
St. Louis, MO 63105
Ph. 314-726-3403
Vicki Savala, Pres.

Full-service market research firm which offers clients a variety of customer satisfaction research including both standard measurements and unique tracking models. Specializing in tailored approaches which are highly targeted and, hence, more effective and efficient. In addition to quantitative capabilities, offer qualitative focus group moderating, one-on-one interviewing, focus group recruitment, and state-of-the-art qualitative facilities.
(See advertisement on p. 28)

Alliance Research
538 Centre View Blvd.
Crestview Hills, KY 41017
Ph. 606-344-0077
Clint Brown, Pres.

Answers Research
225 Stevens Ave., Ste. 108
Solana Beach, CA 92075
Ph. 619-792-4660
Albert Fitzgerald, Dir. Client Svces.

Atlantic Marketing Research Co., Inc.
109 State Street
Boston, MA 02109
Ph. 617-720-0174
Peter Hooper, Ph.D., Pres.

BAI (Behavioral Analysis, Inc.)
580 White Plains Rd.
Tarrytown, NY 10591
Ph. 914-332-5300
Toni Shields, V. P.

Bell Associates
27 Grey Birch Place
The Woodlands, TX 77381
Ph. 713-367-4224
Darla D. Bell, Pres.

Bellomy Research, Inc.
108 Cambridge Plaza Drive
Winston-Salem, NC 27104
Ph. 919-765-7676 or 800-443-7344
Lacy Bellomy, Pres.

Full-service marketing research firm, comprehensive in-house capabilities-facilities, both qualitative and quantitative. Specializing in customer satisfaction measurements, concept, product, packaging, copy and pricing tests, attitude and usage studies, and tracking programs. Quantitative techniques include PlusPower™ which 1) can discriminate between test propositions when traditional measures don't; 2) is reliable in its volumetric estimates; 3) provides meaningful measures to assess marketing propositions.
(See advertisement on p. 15)

Gordon S. Black Corporation
135 Corporate Woods
Rochester, NY 14623
Ph. 716-272-8400
Bob Kallstrand, V. P.

Full service market research firm providing insight into product and service strategies most likely to improve a company's marketplace positioning and market share. Research and consulting on the development of quality improvement programs using customer satisfaction systems research.
(See advertisement on p. 45)

Brittain Associates, Inc.
3400 Peachtree Rd. N.E.
Atlanta, GA 30326
Ph. 404-365-8708
Bruce Brittain, Pres.

Irwin Broh & Associates
1011 E. Touhy Ave.
Des Plaines, IL 60018
Ph. 708-297-7515
Irwin Broh, Pres.

Bruskin-Goldring Research
100 Metroplex Dr.
Edison, NJ 08817
Ph. 908-572-7300
Richard B. Hare, Pres.

Certified Marketing Services
7 Hudson Ave., P.O. Box 447
Kinderhook, NY 12106
Ph. 518-758-6400
Bridget Flynn, Mgr. Mkt. Rsch.

Chesapeake Surveys
4 Park Center Court, Ste. 100
Owings Mills, MD 21117
Ph. 410-356-3566
Carolyn A. Hilton, Fld. Dir.

Full focus group facility with two rooms. One way mirror and exceptionally large viewing rooms, test kitchen, 25 WATS and local central phone center. Specializing in phone interviewing, focus group recruiting, in-store interviewing. Remote client monitoring. Medical, executive, consumer.
(See advertisement on p. 31)

Chilton Research Services
201 King of Prussia Rd., 3rd Flr.
Radnor, PA 19089-0193
Ph. 215-964-4602
Barbara Nuessle, Mktg. Svces. Mgr.

The Corps Group
8025 Forsyth
Clayton, MO 63105
Ph. 314-725-0214
Kim Kardenetz, Sr. Proj. Dir.

Creative and Response Research
500 No. Michigan Ave.
Chicago, IL 60611
Ph. 312-828-9200
Sanford Adams, COO

Daniel Associates
49 Hill Road, Ste. 4
Belmont, MA 02178
Ph. 617-484-6225
Stephen J. Daniel, Pres.

Data Recognition Corp.
5900 Baker Rd.
Minnetonka, MN 55435
Ph. 612-935-5900
Wayne M. Serie, V. P.

Davidson-Peterson Associates
18 Brickyard Ct./P.O. Box 350
York, ME 03909
Ph. 207-363-7347
Karen Ida Peterson

Doane Marketing Research
1807 Park 270 Drive, Ste. 300
St. Louis, MO 63146
Ph. 314-878-7707
David Tugend, V.P.

Doane specializes in customer satisfaction research where evaluations are needed from agricultural dealers and distributors, livestock, grain, and poultry producers, veterinarians, pet food suppliers and other farm suppliers. Some specific multiclient studies are conducted for the U.S. corn seed, animal health, and crop protection industries. Custom research is also conducted for a wide range of clients.
(See advertisement on p. 48)

Ducker Research Company
6905 Telegraph Rd., Ste. 300
Bloomfield Hills, MI 48301
Ph. 313-644-0086
Joanne Ulnick, V.P.

Circle No. 228 on Reader Card

Elrick & Lavidge, Inc.
1990 Lakeside Pkwy.
Tucker, GA 30084
Ph. 404-938-3233
Larry G. Gulledge, Sr. V.P.

Elrick & Lavidge recognizes the importance CSM is to company's Total Quality Management and Continuous Improvement business strategy. Our core strategy is to customize the ServQuest™ process of measurement to individual client needs. We are especially aware of the importance data utilization plays in providing our clients with actionable information that can be functionally deployed.
(See advertisement on p. 2)

Fry Consultants Incorporated
One Park Plaza, Ste. 450
Atlanta, GA 30318
Ph. 404-352-2293
L. Lyne Smith III, Mng. Prncpl.

Hammer Marketing Resources
179 Inverness Road
Severna Park, MD 21146
Ph. 410-544-9191
William L. Hammer, Pres.

Hancock Information Group
2180 W. S.R. 434, Ste. 3170
Orlando, FL 32779
Ph. 407-682-1556
Susan Hancock, Pres.

Hispanic Marketing Communication Research
1535 Winding Way
Belmont, CA 94002
Ph. 415-595-5028
Betty Ann Korzenny

Qualitative and quantitative research, assessing and measuring external and internal customer satisfaction (CS) & needs for the Hispanic, Asian and general markets. CS surveys, interviews, focus groups, tracking studies, organizational assessments. Full service research, process marketing© approach, linking organizations internally and with US/Latin American/Asians customers. Qualified bilingual researchers representing a broad range of experience with service and consumer product industries.

ICR Survey Research Group
605 W. State St.
Media, PA 19063
Ph. 215-565-9280
Steven McFadden, Exec. V.P.

Full-service research consultant with advanced customer satisfaction measurement capabilities. Expertise in qualitative research, telephone and mail surveys, scaling techniques, advanced analytics. Highlight is multiple paired comparison trade-off approach for accurate measurement of what's really important to customers. Works with TQM experts who provide consulting on program implementation. Expertise in consumer and industrial services.
(See advertisement on p. 33, 35, 39)

IDSI
420 Lexington Ave., Ste. 2746
New York, NY 10170
Ph. 212-867-8757
Stephan Sigaud, Pres.

IMS America, Ltd.
660 W. Germantown Pike
Plymouth Meeting, PA 19462-0905
Ph. 215-940-3521
Lawrence J. Worden, Grp. Dir.

Ingold Research & Assoc.
S76W17501 Janesville Rd.
P.O. Box 413
Muskego, WI 53150
Ph. 414-679-2600
Marguerite Ingold, Owner

Integrated Research Group
2108 S. University Dr.
Fargo, ND 58103
Ph. 701-235-0462
Daniel J. Klenow, Exec. Dir.

Intersearch Corporation
132 Welsh Road
Horsham, PA 19044
Ph. 215-657-6400
Alan Widra, Pres.

JRP Marketing Research Services, Inc.
100 Granite Dr., Terrace Level
Media, PA 19063
Ph. 215-565-8840
Paul R. Frattaroli, Pres.

Kennedy Research, Inc.
405A Waters Bldg.
Grand Rapids, MI 49503
Ph. 616-458-1461
R.D. Kennedy, Pres.

KLD Marketing Research
2106 Shallowford Dr.
Valparaiso, IN 46383
Ph. 800-568-4668
Kathy DeWitt, Pres.

The Leverage Group
60 Corporate Woods
Rochester, NY 14623
Ph. 716-272-2524
Marcia Klein, Exec. V. P.

MacFarlane & Company, Inc.
450 One Park Pl.
1900 Emery St. N.W.
Atlanta, GA 30318
Ph. 404-352-2290
Ian MacFarlane, Pres.

Maritz Marketing Research Inc.
1297 N. Highway Dr.
St. Louis, MO 63099
Ph. 800-446-1690
Phil Wiseman, Dir. Mktg. Svces.

Maritz Marketing Research Inc. is a wholly-owned subsidiary of Maritz Inc., a full service performance improvement firm. The company specializes in customized solutions to service quality needs. Utilizing customer satisfaction measurement, customer-focused training, reward and recognition systems, and communications programs, Maritz supports and drives performance improvement strategies throughout an organization.
(See advertisement on p. 47)

Marketeam-Doane Mktg. Rsch.
1807 Park 270 Dr., Ste. 300
St. Louis, MO 63146
Ph. 314-878-7707
David Tugend, V. P., Client Svces.
(See advertisement on p. 48)

More than measurement.℠

Results.

Customer Satisfaction Research That Gets To The Bottom Line.

At Maritz, we believe it's one thing to define customer satisfaction. And another to achieve it. Research firms can conduct programs that stop at measuring satisfaction levels. Maritz goes beyond measurement to improve performance. ☐ Maritz is a leader in Customer Satisfaction because we deliver More than measurement℠ — we put research into action. We work with you to deploy the voice of the customer throughout your organization and integrate it into your Total Quality process. ☐ All of which can impact satisfaction, loyalty, and the bottom line. To learn more, call for our free brochure: **1-800-446-1690.**

Circle No. 239 on Reader Card

MarketVision Research, Inc.
MarketVision Bldg.
4500 Cooper Rd.
Cincinnati, OH 45242
Ph. 513-791-3100
Robert V. Miller, Sr. V.P.

MarketVision is a leader in customer satisfaction and quality assessment tracking. Our approach includes program design, administration, consulting and action step recommendations developed to achieve total quality successes. MarketVision is the only marketing research firm to receive consecutive *Inc. 500* awards for sustained growth and the U.S. Chamber of Commerce Blue Chip Award for client service excellence.
(See advertisement on p. 11)

Marketing Research Services, Inc.
15 East Eighth Street
Cincinnati, OH 45202
Ph. 513-579-1555
Dave Disher

Market Probe, Inc.
1233 N. Mayfair Rd., Ste. 100
Milwaukee, WI 53226
Ph. 414-778-6000
T.R. Rao, Pres.

Marketing Metrics, Inc.
305 Route 17
Paramus, NJ 07652-2905
Ph. 201-599-0790
Terry G. Vavra, Pres.

The Marketing Partnership
90 Hamilton Street
Cambridge, MA 02139
Ph. 617-876-9555
Susan Earabino, Prncpl.

Market Place Research
6500 Willow Hollow
Cincinnati, OH 45243
Ph. 513-561-5519
Gregory Widmeyer, Mktg. Rsch. Dir.

Mathews & Company
Six Landmark Square
Stamford, CT 06901-2792
Ph. 203-325-8419
Richard S. Mathews, Pres.

McLauchlan & Associates
3322 Erie Ave.
Cincinnati, OH 45208
Ph. 513-871-8666
Staci McLauchlan, Pres.

McWilliams Research Associates
Three The Pines Court, Ste. F
St. Louis, MO 63141
Ph. 314-275-8342
Robert McWilliams, Pres.

MDI, Inc.
2222 Gallows Road
Vienna, VA 22182
Ph. 703-204-1500
Paul Duffy, Pres.

Meyers Research Center/
TradeSmart Survey™ Div.
58 West 40th Street
New York, NY 10018
Ph. 212-391-0166
Arthur Zimbalist, V. P.

Michelson & Associates, Inc.
3805 West Lane Drive
Atlanta, GA 30080
Ph. 404-436-0330
Mark Michelson, Pres.

John Morton Company
203 N. LaSalle St.
Chicago, IL 60601
Ph. 312-726-2010
Doug Squeo, V. P.

Mystery Shopping & Market Rsch. Svces.
P.O. Box 806
Plymouth Meeting, PA 19462
Ph. 800-355-5040
Peter Thorwarth, Pres.

National Computer Systems
4401 West 76th St.
Edina, MN 55435
Ph. 612-893-8307
Thomas Lacki, Ph.D., Mgr. Srvy. Rsch.

National Survey Research Ctr.
10107 Brecksville Rd., Ste. 340
Brecksville, OH 44141
Ph. 216-838-7640
Alan F. Dutka, Pres.

NCM Int.
3000 Malmo Dr.
Arlington Heights, IL 60005
Ph. 708-439-4300
Dr. Ted Sommers, Dir. Mktg. Rsch.

Next Generation Research
30301 Wedgewood Dr.
Solon, OH 44139-1508
Ph. 216-498-1185
Jonathan E. Brill, Ph.D., Prncpl.

Nordhaus Strategic Directions
20300 W. 12 Mile Rd., Ste. 102
Southfield, MI 48076
Ph. 313-827-2400
Jan Leon Wozick, Ph.D., Mng. Dir.

Opinion Dynamics Corp.
One Kendall Sq., Bldg. 200
Cambridge, MA 02139
Ph. 617-494-1254
John W. Gorman, Pres.

Opinions Unlimited Inc.
8201 S.W. 34th
Amarillo, TX 79121
Ph. 800-658-2656
Anndel Hodges-Martin, Pres.

Palshaw Measurement, Inc.
Box 1439
Pebble Beach, CA 93953
Ph. 408-625-2500
John L. Palshaw, Pres.

Performance Focus
P.O. Box 2613
Boca Raton, FL 33427-2613
Ph. 407-392-5554
Judith Levy, Pres.

Prince Marketing, Inc.
2323 Hillsboro Rd.
Nashville, TN 37212
Ph. 615-292-8686
Dan Prince, Pres.

Prognostics
4500 Bohannon Dr., Ste. 290
Menlo Park, CA 94025
Ph. 415-688-1900
J.B. Wood, Dir. Mktg.

Q-1 Research, Ltd.
1011 Northridge
Chadds Ford, PA 19317
Ph. 215-388-2160
Eugene Goldsmith, Pres.

Quality Strategies,
A M/A/R/C Group Co.
7850 N. Belt Line Rd.
Irving, TX 75063
Ph. 214-506-3431
Corinne F. Maginnis, Pres.

Rabin Research Co.
150 E. Huron, Ste. 800
Chicago, IL 60611
Ph. 312-482-8500
Michelle Elster, V.P.

Reactions Inc.
634 Berkeley Ave.
Orange, NJ 07050
Ph. 201-673-4610
Donna G. Chlopak, Ph.D., Pres.

The Research Center
825 E. Douglas, P.O. Box 820
Wichita, KS 67201-0820
Ph. 316-268-6209
Marna Young, Rsch. Mgr.

The Research Group, Inc.
8289 Golf Rd.
Niles, IL 60714
Ph. 708-966-8900
William J. Smith, Pres.

Research International
205 Lexington Ave.
New York, NY 10016-6069
Ph. 212-679-2500
Simon Chadwick, Chairman/CEO

Smart™ combines third generation qualitative research with the state-of-the-art micromodelling to put hard and soft attributes of customer service into meaningful and measurable terms. Smart™ identifies aspects of service relevant to customers. Measures relative importance and competitive performance for each service aspect. Places a value on improving in each service area. Segments customers according to their needs. Provides cost-benefit analyses.
(See advertisement on p. 49)

Research Pros, Inc.
590 Valley Hall Dr.
Atlanta, GA 30350
Ph. 404-804-9103
Catherine Wright, Pres.

Response Analysis Corp.
377 Wall St., P.O. Box 158
Princeton, NJ 08540
Ph. 609-921-3333
Chris Jaworski, V.P.

Rockwood Research Corp.
1751 W. Co. Rd. B
St. Paul, MN 55113
Ph. 612-639-2229
Dale Longfellow, Pres.

Full service provider of qualitative and quantitative studies. Quantitative studies use latest visual modeling techniques and segmentation analysis. Actionable reports clearly provide you with direction in maximizing market share.
(See advertisement on p. 26)

Satisfaction Measurements, Inc.
1236 Carlisle Rd.
North Brunswick, NJ 08902
Ph. 908-247-2122
Donald M. Barry, Pres.

Sources For Research, Inc.
170 West End Ave., Ste. 30C
New York, NY 10023
Ph. 212-787-8810
Phyllis Morrow, Pres.

Southeastern Institute of Research, Inc.
2325 W. Broad St.
Richmond, VA 23220
Ph. 804-358-8981
Robert M. Miller, Pres.

Southeastern Institute of Research, Inc. is a full service marketing research company. It specializes in gathering and analyzing qualitative and quantitative information for advertising agencies, health care organizations, telecommunications companies, financial/banking industries and other service and business-to-business organizations. SIR designs and implements custom studies that evaluate image/awareness, explore the feasibility of marketing development/expansion, track market growth, determine customer satisfaction, and test advertising campaigns. SIR's services include nationwide phone studies, focus groups, in-depth interviews, mall intercepts.
(See advertisement on p. 34)

Strategic Consumer Research, Inc.
26250 Euclid Ave.
Cleveland, OH 44132
Ph. 216-261-0308
Dr. Barry Sabol, Pres.

TeleSession Corporation
355 Lexington Ave.
New York, NY 10017
Ph. 212-599-1500
Fred Weiss, V.P., Mktg.

Thomas Marketing Info. Ctr.
5 Penn Plaza
New York, NY 10001
Ph. 212-629-1111
Barbara Drake-Lobrano, Dir. Sls.

Total Research Corp.
5 Independence Way CN5305
Princeton, NJ 08543-5308
Ph. 609-520-9100
James M. Salter II, V.P.-Qual. Mgt.

Total Research-Quality Management (TR-QM®) is a process that identifies, measures, monitors, and deploys critical elements of customer satisfaction and quality to provide actionable information to manage and improve quality. It combines a customized process design with excellent basic survey research expertise, advanced analytic techniques and improvement-oriented output (action planning).
(See advertisement on p. 50)

USA/DIRECT, Inc.
133 S. Livingston Ave., Ste. 200
Livingston, NJ 07039
Ph. 201-731-0074
Guy Parker, Pres.

Walker: Customer Satisfaction Measurements, L.P.
3939 Priority Way So. Dr.,
P.O. Box 80432
Indianapolis, IN 46280-0432
Ph. 317-843-3939
Sheree L. Marr, Sr. V.P.

Walker: Customer Satisfaction Measurements has been a leader in customer-perceived quality assessment and tracking for over twenty years. Currently conducting over 150 customer satisfaction managment programs, Walker: CSM provides an evaluation of company performance in meeting customer requirements and a diagnostic tool for quality improvement priorities and competitive opportunities.
(See advertisement on p. 51)

LISTING ADDITIONS

Please add the following facilities to the 1992 Directory of Focus Group Facilities:

West Group Marketing Research
1110 E. Missouri, Ste. 780
Phoenix, AZ 85014
Ph. 602-264-4915
Contact: Ilona Guzman
1,2,3,6B

SMS Research
1042 Fort Street Mall, Ste. 200
Honolulu, HI 96813
Contact: Jim Dannemiller
1,3,4,6B

iNFOCUS Group Services
5101 Cleveland St., Ste. 304
Virginia Beach, VA 23462
Ph. 804-490-1351
Contact: Grace Stanton 1,3,4,6B

Please add the following facility to the 1992 Directory of Telephone Interviewing Facilities:

NTS Research
236 Massachusetts Ave., N.E., Ste. 610
Washington, DC 20002
Ph. 202-675-4500
Fax 202-546-0984
Contact: Ginger King
25-0-25-0

Please note the following additions and corrections to the 1992-93 Researcher SourceBook. Corrected text is shown in bold.

Maritz Marketing Research/
Automotive Research Group (Br.)
1515 W. 190th St., Ste. 245
Gardena, CA 90248
Ph. (**310**) 323-2459
Fax (**310**) 323-2459
Carolyn H. Garfein, V.P.

Maritz Marketing Research/
Automotive Research Group (Br.)
3001 W. Big Beaver Rd., Ste. 500
Troy, MI 48084
Ph. (313) 643-6699
Fax (313) 643-2189
Robert P. Stephenson, V.P.

The Maritz listing on page 66 has a new address:

Maritz Marketing Research/
Performance Measurement Group (Br.)
333 Twin Dolphin Dr., Ste. 240
Redwood City, CA 94065
Ph. (415) 802-4101
Fax (415) 508-1875
John Glazier, Sr. Acct. Mgr.

On page 7, the phone number for **Mature Marketing Research** should read 203-797-0666. In addition, on page 77, the phone number for **Mature Marketing Research** should read 203-797-0666. The fax should read 203-748-1735.

On page 74, the "see advertisement" reference under the **CSi Testiug Centers** and **Youth Research** listings should read "See advertisement on p. 239."

On page 224, add **Fieldwork, Inc.** to the "Focus Group-Facilities" cross-index category.

Add the following listing to the San Francisco section of the geographical listings:

Ecker & Associates
222 Front St., 3rd Flr.
San Francisco, CA 94111
Ph. 415-871-6800
Fax 415-871-6815
Betty Rosenthal

Miami research firms survive wrath of Hurricane Andrew

Although Hurricane Andrew caused massive damage to southern Florida, Miami marketing research firms report that they were spared from the devastation. Most field service firms were only closed for a day or two and all reported being fully operational within a week after the storm struck last month.

After talking to a number of research firms in the Miami area, we found that only a few of them sustained damage from the storm which ripped threw on August 24th. Mary Rife, president of Rife Marketing Research, Inc., said that the primary damage occurred about 60 miles south of Miami in the Homestead and Florida City area. "We had few cancellations prior to Andrew reaching the coast. All services to our area were back to normal very quickly and we are anticipating our bookings to be excellent during the fall and winter months."

Other firms such as Strategy Research Corporation, Weitzman & Philip, Inc. and Behavioral Science Research had similar observations. These field service companies said that aside from losing a few palm trees due to the high winds, they were otherwise spared any extensive damage and that other local firms were in normal operation within a few days of the storm.❑

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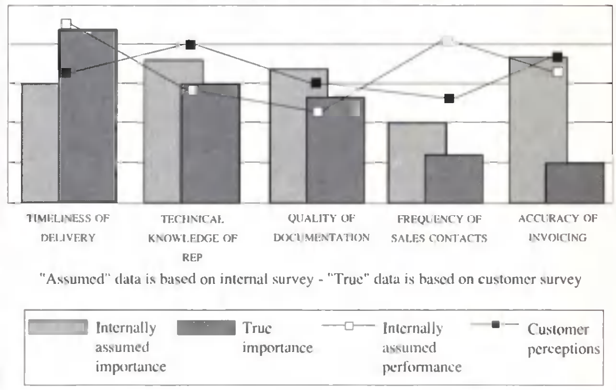
Sigaud says.

Figure one shows an example of the results of gap analysis work. "In that case," Sigaud says, "our client had internally

FIGURE ONE: "ASSUMED" VS. "TRUE" GAP ANALYSIS ON KEY SERVICE CHARACTERISTICS



"Assumed" data is based on internal survey - "True" data is based on customer survey

assumed that accuracy of invoicing was really important to their customers but the customers told us it was not very important. They had a pretty high customer satisfaction rating but it shows that you probably don't need to make your customers that satisfied in that area. So, take some of the resources you've put into accuracy of invoicing, since it's not that important, and put them back into quality of documentation, which is more important, and you'll probably see your ratings go up. It helps you focus your resources much better."

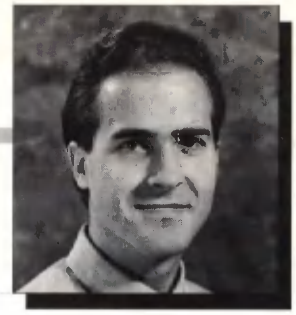
More importance

One client, Rohm & Haas, a specialty chemicals company based in Philadelphia, learned that clients placed more importance than it did on the certificates of analysis, which are forms that guarantee the composition of material being shipped to customers. "Rohm & Haas had missed the importance of the accuracy of these sheets to their customers. They had taken it for granted as another piece of paperwork and they had not paid it too much attention," Sigaud says.

Sometimes companies underestimate themselves, Sigaud says. "Rohm & Haas thought that customers had a very bad perception on timeliness of delivery. Therefore they were beating themselves up because they felt they weren't properly organized and they were wasting time and money trying to fix their delivery system. When in fact the study showed that the perception of the customers in terms of delivery was very good."

The power of hard figures is what helps gap analysis contribute to employee buy-in, Sigaud says. "If you are the business manager of a company and you have embarked on a total quality program and you're always facing that I-told-you-so attitude, you need something to convince your people. You need a quantified approach to sell anything in the industrial world. You're talking to engineers, they want numbers. Show them some good clear and powerful graphs, you're going to win a lot of agreement from people who would not be ready to work with you on something that's only words. If you give them the words, plus the numbers and the graphs, that's going to work much better." ❑

By Joseph Rydholm
managing editor



Biz-to-biz technique aims to bridge the gap

There are many reasons why a customer satisfaction or total quality program won't gain support within a company or organization: lack of money, organizational bureaucracy, fragile egos, and even good old fashioned inertia. One of the most powerful is employee skepticism. To make a quality program successful, the employees have to "buy in" to the process.

That buy-in is critical, because management can talk all it wants about the benefits of total quality, but if the employees—the people who deal with the customers—don't participate, the program is doomed. Stephan Sigaud, president of IDSI, a New York City-based marketing research and consulting firm that specializes in industrial and business to business markets, knows well the difficulty of convincing employees that the customer satisfaction research results he presents to them are worth their attention.

"We've experienced that when you work only with management, they are convinced that total quality is useful and that it should be done within the whole company. But the sales people usually aren't that convinced. They think it's fluff, that it doesn't really help with sales because they don't see the direct impact on getting new accounts.

"The problem is, after doing the research you come back with a picture of the market and you say, 'this is what your customers say you're doing right and doing wrong.' If you're talking to the business director, for example, he's probably going to believe you because he is far enough from the field that he'll have an objective view. But as soon as you talk to someone in marketing and sales you're going to have difficulty making them believe the research and act upon it because they'll tell you either, 'we knew that already' or, 'that's exactly what we thought.' "

Gap analysis

IDSI has created a technique for customer satisfaction research called gap analysis that's intended to head that stubbornness off at the pass. The technique gives a company a picture of the gaps that exist between how its employees view its service performance and how its customers view its performance.

Here's how it works: First, company employees fill out a customer satisfaction survey as they think the customers would, grading the company's performance in selected service areas. The employees must also indicate how important they think those service attributes are to their customers. Then, actual customers take the same survey and the two results are compared to find the gap between employee and customer perceptions.

"As soon as we're done developing the questionnaire for the customer survey," Sigaud says, "we administer it internally to our client's personnel, to everybody involved with customers—management, sales and marketing, and also people in manufacturing and R&D. We ask them to fill it out as if they were customers. We ask them to rate the importance of the issues to customers and the performance of their own company in delivering those services."

Validate results

Involving the employees goes a long way to helping validate the results of the research done with customers, and helps sell the employees on the value of being customer driven, Sigaud says. "By doing the gap analysis, you're giving the employees the chance to participate up front. So when you come back to them a month or two months later with the recommendations, you've created a much better chance that they'll react to them the right way. By recording what they think up front, you have a baseline. And at the end of the project when you present the results, you avoid the I-told-you-so or this-confirms-what-we-thought attitude."

The employee surveys are done anonymously, so people can complete the surveys without fear that management will punish them for their candor. "So if you're a sales guy in the field and you have a very strong opinion, you're safe with your opinion. You can fill out the questionnaire without risk,"

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