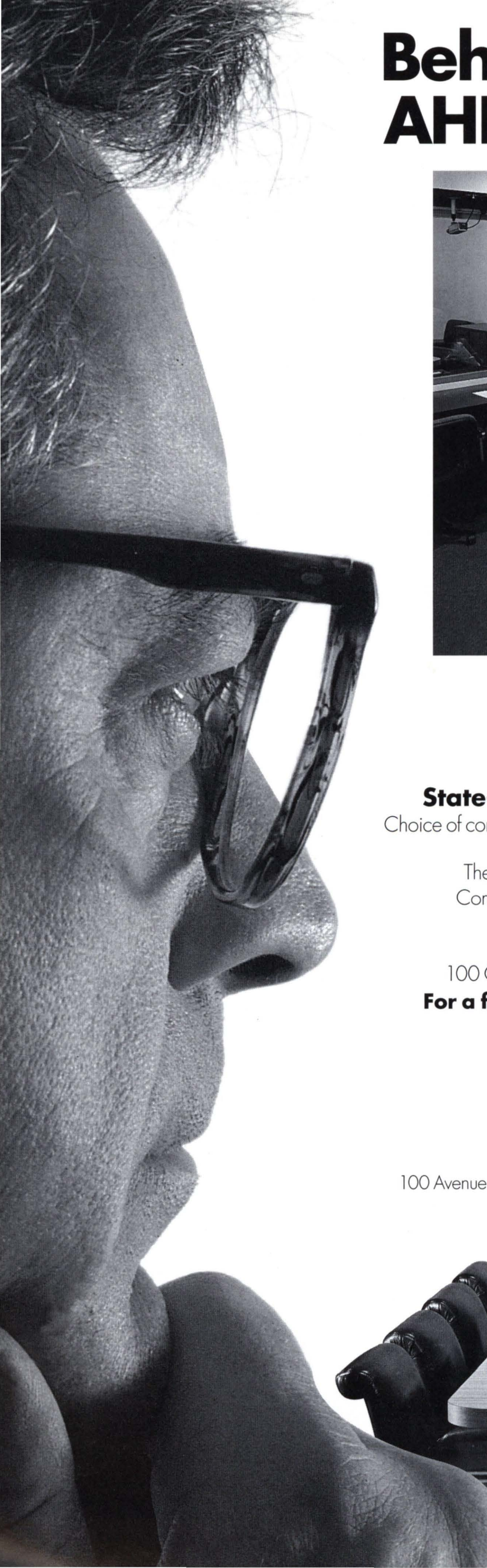
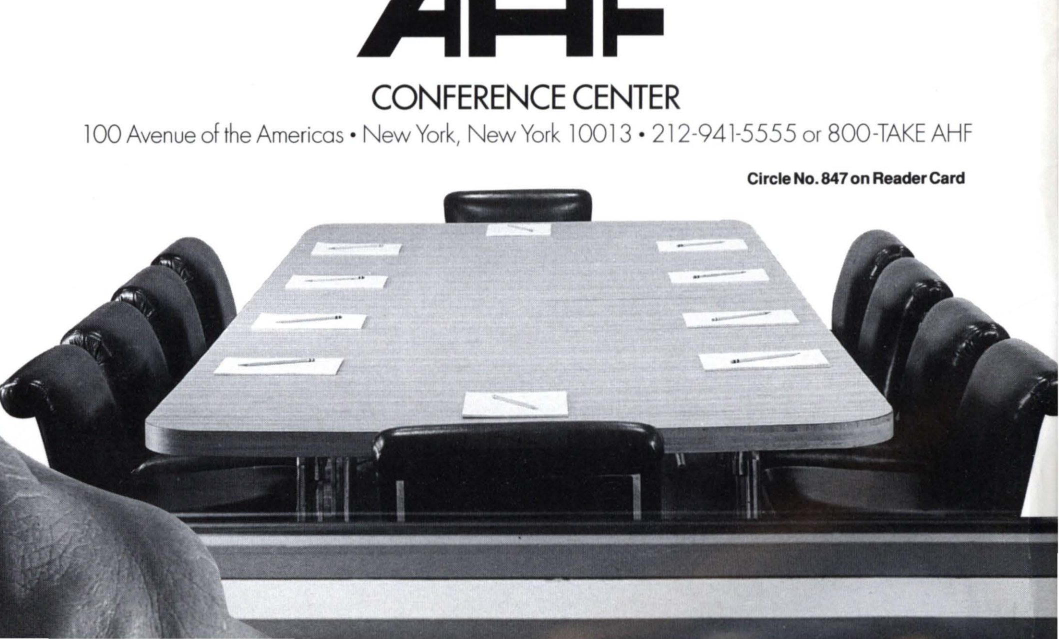
Quirk's MARKETING RESEARCH Review

Post-merger research results in a reorganized Georgia-Pacific Papers

Business-to-business issue

April, 1993





Quirk's
MARKETING RESEARCH
Review

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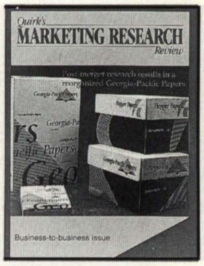

Cover
Research drove decisionmaking behind Georgia-Pacific Corporation's post-merger reorganization effort. Photo courtesy of Georgia-Pacific Corporation.

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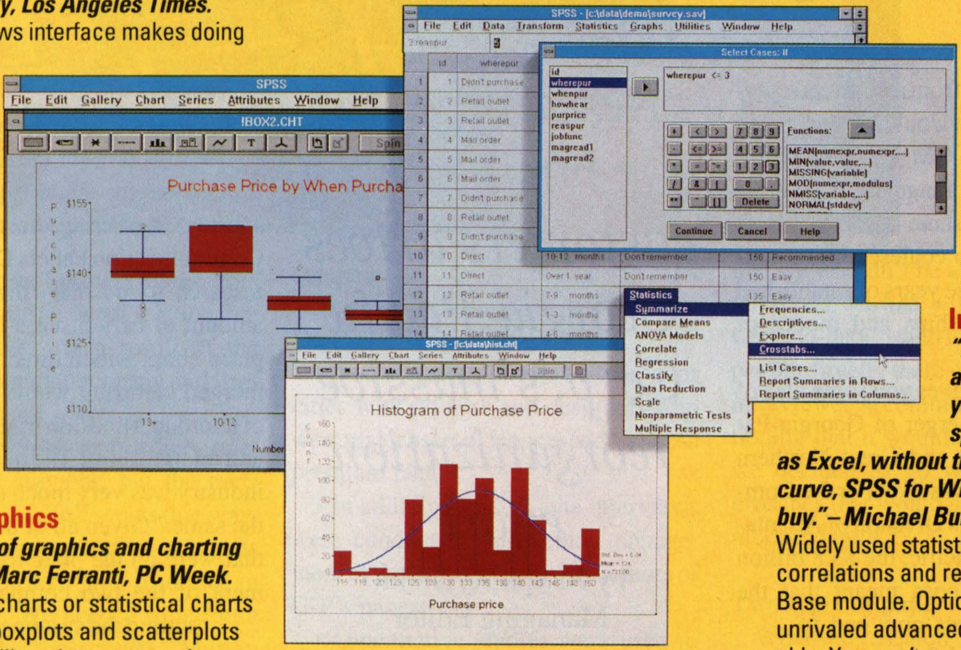

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Georgia-Pacific Papers

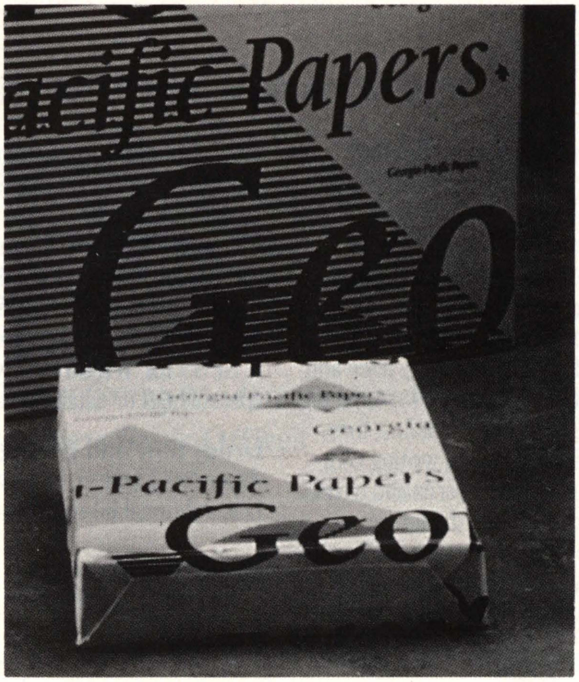
On the wings of an eagle

Research with business customers drives Georgia-Pacific Corp.'s massive reorganization effort

by Joseph Rydholm
Managing Editor

Just imagine, from a business standpoint, what it would be like if Ford merged with GM. Two huge companies selling a range of competing products in the same markets would gradually have to coalesce into a unified whole, despite years of established business relationships and modes of operation.

That scenario gives you some idea of what the 1990 merger of Georgia-Pacific Corporation and Great Northern Nekoosa Papers was like. For the Communication Papers Division of Atlanta-based Georgia-Pacific, the $3.8 billion takeover of Nekoosa meant that the former competitors now had to work together and find a way to incorporate product lines, sales forces, and customer bases.



G-P's Communication Papers Division is a $1.2 billion unit of Georgia-Pacific Corporation, a company that makes a host of products from gypsum wallboard to bathroom tissue. The Communication Papers Division produces a variety of uncoated, free sheet business and writing papers. The merger also affected the operation of Hopper Paper Company, a G-P unit that produces cover, text and specialty papers, because Nekoosa had a similar line of papers.

Status quo

Immediately after the merger the best course of action for the time being was to preserve the status quo, says Frank Murray, marketing director for G-P's Communication Papers Division. Early research found that "there was a fair amount of nervousness in the marketplace about which direction the newly merged company would take in terms of its product lines, distribution approach and relationships. The desire within the industry was very much one of 'keep it the same.' Given all of the other things that were on the plate for the management of the two companies, such as putting the systems of the companies together and the personnel issues involved, the easiest and most prudent thing at the time seemed to be to preserve as much as possible a separateness and acquiesce to the industry's desire."

But as time wore on it became clear that something needed to be done to address the redundancies caused by the merger. That 'something' took the form of what Georgia-Pacific Papers called Project Eagle, a wide-ranging reorganization program that began in early 1992.

"The Project Eagle task force was intended to look at our business-to-business relationships

with our merchant business distributors and ask the question, what relationship should we have? As a result of the merger, from a manufacturing and supplier point of view, we could see ourselves as a much more full-line, one-stop shopping supplier, but the merchant customers didn't see us that way. They saw us as a patchwork of brands and products, which was resulting in poorer service. We needed to put in a process to resolve those issues," Murray says.

"How we had thought of ourselves internally was at variance with how our customers saw us. That required actions on our part to realign our organization, to rationalize our product line, and rethink our distribution relationships. And all of that's being done in a market where we've undergone a large merger and where our research indicated there's a fair amount of anxiousness about what the future looks like."

Host of questions

A key element of Project Eagle was a research effort designed to determine how to structure the future operation of both the premium papers and the "everyday use" business paper sides of the company.

The research conducted for Project Eagle was three-pronged:

• Focus groups were held in four cities with printers and designers who were major users of Hopper and Nekoosa premium papers.

• In addition, one-on-one interviews were conducted with senior management of the key merchant distributors of G-P's papers.

• Quantitative studies were used to survey office paper buyers as well as printers and designers.

Most questions centered on the value that respondents saw in a number of restructuring possibilities: Would there be value in a focused sales force that sold only premium papers? Would there be value in having shipments come from one location instead of two? Or in being able to sort and amalgamate products by putting the two brands together?

As with any business-to-business related project, when manufacturers talk to anyone who is part of the production and distribution chain, respondents may fear that what they say will come back to haunt them, that they may be punished for their candor. The company knew that independent research was the best route, Murray says. "We decided that we wouldn't be able to answer the questions we had within the walls of Georgia-Pacific and that if we talked to people directly there would be so much interviewer accommodation and positioning that it wouldn't be fruitful. So we decided to go with research approaches that would get at those issues independently."

Two types of paper

What the research showed was that the merger had left the new Georgia-Pacific Corp. with two separate businesses. "They weren't Georgia-Pacific and Great Northern Nekoosa businesses, they were different types of paper businesses," Murray says.

The first type was the premium cover and text papers used primarily by designers and specialty printers. They come in a variety of colors and textures, tend to be relatively high priced, ordered in small quantities, and require fast turnaround and a high level of service.

The second—and biggest—is the uncoated white papers business that includes office copier paper and other commonly used business paper items. It

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Making contacts

In its history, Chicago-based contact lens manufacturer Wesley-Jessen Corp. has brought many innovations to its industry. Founded in 1945 by two optometrists, Dr. Newton K. Wesley and Dr. George Jessen, it was the first U.S. company to make contact lenses. More recently, it introduced the DuraSoft line of colored contact lenses. The innovations don't stop at the product line. Through research and a total quality management (TQM) initiative, Wesley-Jessen (now a division of Schering-Plough Corp.) is working to raise the service standards in an industry that historically hasn't paid a lot of attention to customer satisfaction.

"The key finding that came out of our initial qualitative research (back in 1990) was that the contact lens industry as a whole was rated poorly," says Jim Moritz, director of total quality management, Wesley-Jessen. "Even today, in our own research results, the leader still only satisfies their customers two out of three times."

TQM effort

To improve the level of service, Wesley-Jessen began a TQM effort after talking to its customers to determine the service attributes to measure in an ongoing survey effort. With the help of Minneapolis-based Lakewood Research, the company held focus groups across the U.S. with opticians, optometrists, and ophthalmologists working independently and in retail chain locations. "The basic purpose was to get a laundry list that we could include on the questionnaires," says Gary Ballman,

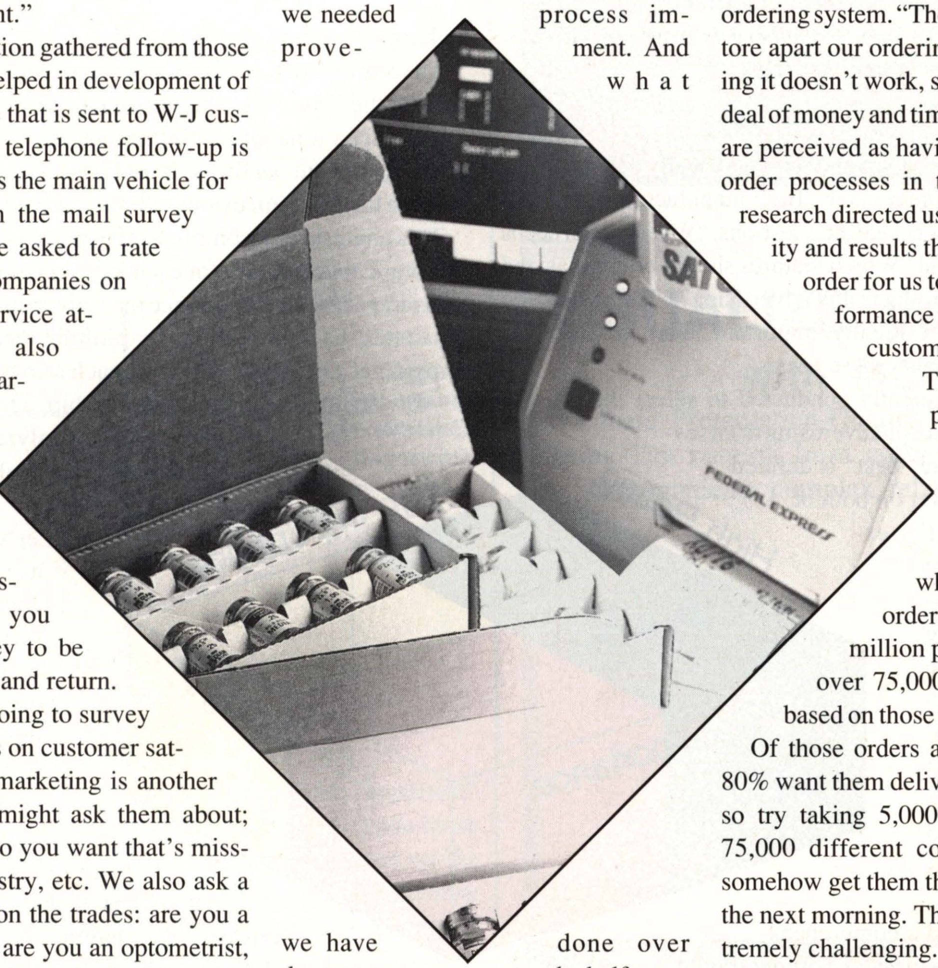
Wesley·Jessen®
CORPORATION

Contact lens manufacturer Wesley-Jessen focuses on customer opinion with ongoing research

director, Lakewood Research. "In terms of results, the consensus was that service quality standards in that industry aren't terribly high. Optometrists want their manufacturers just to do the basic core things right."

The information gathered from those focus groups helped in development of a questionnaire that is sent to W-J customers. (Some telephone follow-up is used but mail is the main vehicle for the survey). In the mail survey respondents are asked to rate contact lens companies on each of the service attributes. They also answer some marketing and segmentation questions. "We try not to add too many extra questions because you want the survey to be easy to fill out and return. But if you're going to survey your customers on customer satisfaction then marketing is another area that you might ask them about; what product do you want that's missing in the industry, etc. We also ask a few questions on the trades: are you a chain location, are you an optometrist, optician or ophthalmologist? We get a little segmentation, some marketing and some service characteristics.

"We feel the customer research is one of the smartest things we've done," Moritz says. "Getting quantitative and qualitative data on what's important to the roughly 30,000 doctors that we deal with told us what our strengths and weaknesses were and where we needed process improvement. And what we have done over the past two and a half years is pay very close attention to the 26 service characteristics that the doctors have said are the most important to them."



Ordering system

For Wesley-Jessen, product quality has never been a problem area. Instead, in the early research customers expressed dissatisfaction with the product ordering system. "The doctors basically tore apart our ordering process by saying it doesn't work, so we spent a great deal of money and time to fix it. Now we are perceived as having one of the best order processes in the industry. The research directed us right to the activity and results that were needed in order for us to enhance our performance in the minds of our customers."

The customers phone their orders in to the company's Chicago processing center, which handles 5,000 orders a day and over a million per year. "We ship over 75,000 different SKU's based on those 5,000 phone calls. Of those orders approximately 75-80% want them delivered the next day, so try taking 5,000 orders a day of 75,000 different contact lenses and somehow get them there by 10 o'clock the next morning. The logistics are extremely challenging."

Recently, the company switched to an automated picking system to increase the efficiency of the order-filling process. "The automated system can pick

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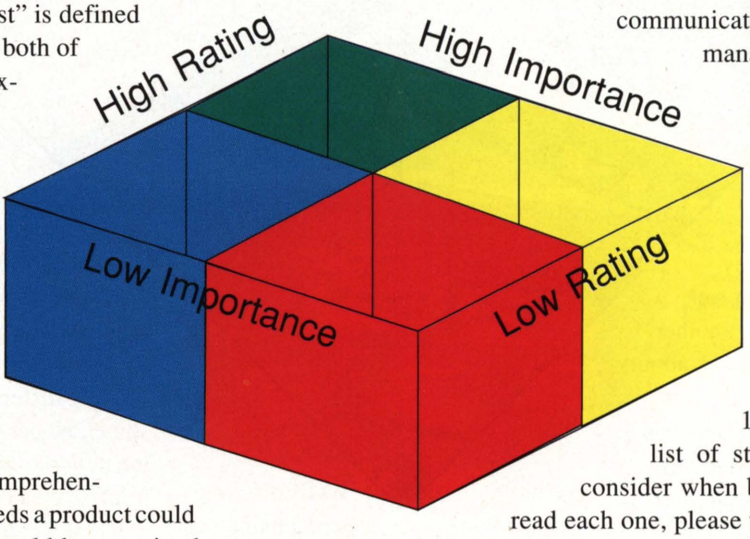
Quadrant analysis

by Norman Frendberg

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

Successful products and services usually deliver one or more consumer needs. Both manufacturers and service providers face the questions: "What human needs are being met?" and "Which features should be emphasized when designing products and advertising?" The answers to both queries are critically important since future sales volume depends upon these issues.

Studies are frequently conducted to select the "best" product/concept/advertising from several choices, where "best" is defined as the highest scorer on both of two dimensions. For example, the "best" attributes to emphasize in positioning new products are those that are perceived as both important to the consumer and not adequately provided by existing products.



If we developed a comprehensive list of the human needs a product could satisfy, some of them would be perceived as more important than others, while some needs would be met by products currently on the market. The human needs that represent the most direct opportunity are those which are concurrently most important to consumers and perceived as lacking in existing products.

The relevant data includes two respondent evaluations for each of the appropriate human needs. One evaluation is an importance rating and the other rates the brand used most often. Quadrant analysis is one way to simultaneously analyze the two dimensions of brand rating and importance.

This analysis is accomplished by plotting the importance and brand rating scores for each attribute on one graph. One axis represents the importance measure, while the other axis illustrates the brand rating. By plotting the coordinates of importance and brand rating for each attribute, we are able to visually depict their relationship. This visualization will enable us to both analyze the data and communicate insightful evaluations to management.

Let's continue with a quadrant analysis example based on importance and brand rating. The data used to create this plot come from two questions such as the following:

1. I'm going to read you a list of statements that you might consider when buying fresh melons. As I read each one, please tell me if that statement is "extremely important," "somewhat important," "slightly important" or "not at all important" to you when selecting fresh melons.

2. Now, I'm going to read the same list of statements. This

time, please tell me how well you feel each statement describes "Brand X" fresh melons, which you told me you purchase most frequently. Does this statement [read first statement] describe "Brand X" melons "completely," "very well," "somewhat" or "not at all"?

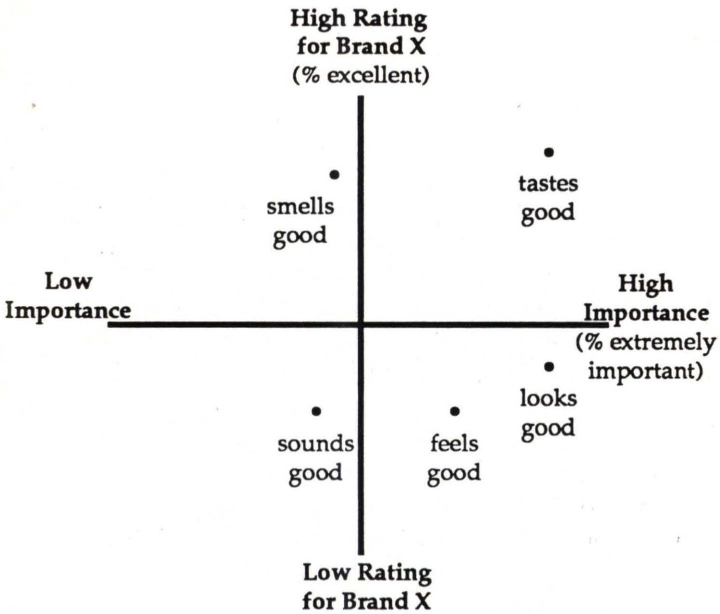
Table 1 below shows the hypothetical attribute scores on both measures: importance of fresh melons and "Brand X" fresh melon ratings.

Table 1

Attribute	Importance	Rating of Brand X
	(% extremely important)	(% describes completely)
(Base)	(200)	(200)
Tastes good	80%	80%
Feels good	40%	40%
Looks good	80%	20%
Sounds good	20%	40%
Smells good	10%	60%

Table 1 provides the data to create the following quadrant plot for our hypothetical melon study:

Quadrant Analysis

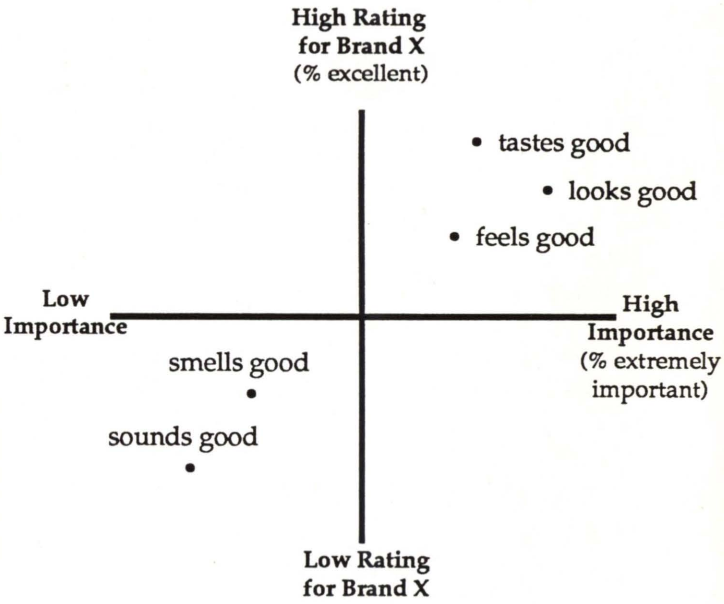


The attributes with the highest "extremely important" scores are located on the right half of the map, while those with the lowest "excellent" association are located on the bottom half. The quadrant on the lower right side of the map could be referred to as the "direct opportunity quadrant," since it represents those attributes that are perceived as very important, but lacking in the current brand.

This plot facilitates the analysis and communication of the results to marketing management, i.e., it identifies "feels good" and "looks good" as offering special opportunity because they are considered important and rated low for the existing brand.

The data and corresponding quadrant analysis are not always as straightforward as the previous melon example. Occasionally, the attribute measures are highly correlated, i.e., those attributes that are rated high on importance also score high for the brand rating. This situation results in a quadrant map that may look like this:

Exhibit 2a



The map in Exhibit 2a is less useful in the creation of actionable marketing insights. However, with a slightly different calculation method, we are able to use quadrant analysis even when there is a high correlation between the measures.

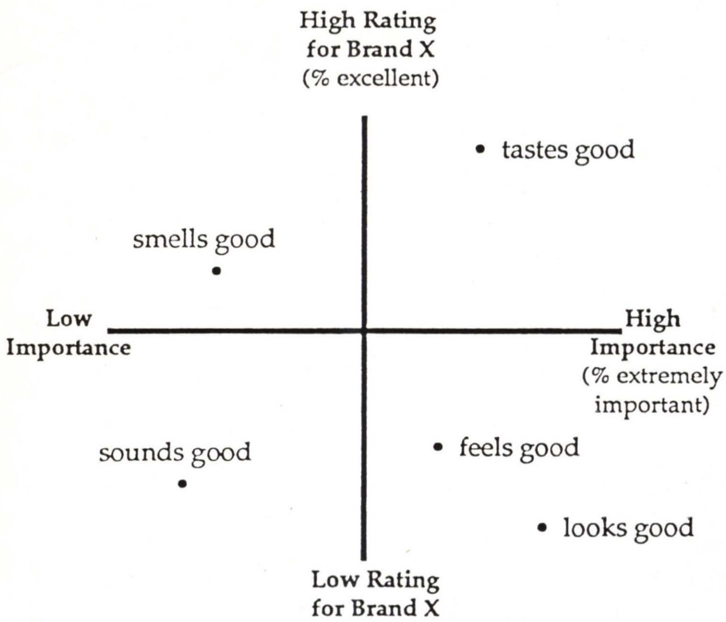
The calculation method changes only for the brand rating. The new "describes completely" percentage for a particular attribute is calculated only among those respondents who rated that attribute "extremely important." Using the melon example—40% of the 200 (or 80) rated "feels good" as "extremely important." Among that 80, we would calculate the percent who rated "Brand X" as "describes completely" on "feels good."

Thus, the new calculation approach for each attribute is as follows:

- Importance—among total sample percent rating attribute "extremely important."
- Brand rating—among only those rating the attribute "extremely important" and percent rating "describes completely."

The resulting quadrant map will appear more like Exhibit 2b, which is more useful in generating marketing insights. Furthermore, this exhibit may enhance the market researcher's ability to understand "truth" since the brand ratings are key among those users regarding the attribute as important.

Exhibit 2b



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Customer surveys yield some unanticipated benefits

by John M. Cole

Editor's note: John M. Cole, Ph.D., is president of Pacesetter Surveys, Inc., San Mateo, California.

The past decade has brought American businesses to a much clearer understanding of the importance of customer perceptions and the measurement of customer satisfaction. Beginning with Tom Peters' book, "In Search of Excellence," emphasis has crystallized on the need to listen to customers closely and regularly, and to collect data on the customer's thoughts. The primary vehicle for measuring customer perceptions in a formal sense is the customer survey. Surveys are now widely used to measure customers' ever-changing satisfaction levels as well as to gauge projected future needs for products and services. Survey data has become a management tool that provides both the direction for change as well as a form of accountability for change.

Pacesetter Surveys has been conducting customer surveys since 1985, primarily with companies that sell to other companies. Over this eight-year period, survey data has brought a number of facts to light that were not originally foreseen as major benefits of the survey process. The focus of this article is to relate some of these unanticipated findings that have provided unexpected and often highly significant benefits to my clients.

Customer satisfaction—The basic stuff

Most companies conducting customer surveys want to know how their customers perceive their products, services, and people. Satisfaction scales are used, and customers indicate their levels of satisfaction on such things as the salesperson's understanding of the business, the quality and reliability of the product, and the effectiveness of the toll-free telephone support center. Customer satisfaction surveys typically provide data that helps a company evaluate how their different departments, product groups, or regional centers are performing relative to each other, or relative to customer expectations. The following survey-derived information has taken my clients beyond their original expectations and in most cases, has provided substantial added value.

1. Finding management "blind spots." As a rule, management reacts to survey results in a fairly predictable way; they acknowledge a few "surprises," but generally contend that the data confirms and quantifies information that they already know. Since most organizations want to appear "connected" to their customers and to be very customer oriented, there is a general reluctance to admit openly that certain aspects of the data were unexpected. This attitude can result in a reduced sense of urgency and a failure to deal with the fact that there are issues that need attention and that management may in fact be out of touch with customers.

One way to deal with the problem is to have managers take the same survey as their customers, with instructions to indicate how well they (the managers) think their company is performing. A subsequent comparison of these managers' survey scores with those of their customers can point out areas of major discrepancy. When these disparities exceed some value, say 20%, one can say that there is a major "blind spot" that needs special scrutiny.

An example of the blind-spot phenomenon recently occurred in a company that was convinced that they had major quality problems. The organization had been listening attentively to complaints about quality and were ready to undertake a major re-organization of their quality department. Survey results from managers documented the belief that quality was perceived to be a major problem. Survey results from customers, however, showed high overall levels of satisfaction with quality, but low satisfaction with product delivery and availability. The comparison of managers vs. customer survey data indicated major "disconnects" on these issues. As a result of the blind-spot analysis, the direction of the change effort was focused on the appropriate area rather than on inappropriate ones.

2. The decision to purchase a competitor. A Fortune 500 manufacturing firm conducted a customer survey that compared customer satisfaction with their own performance vs. that of their competitors. Since customers typically bought from multiple vendors, they were in a position to rate the client company performance as well as that of their competitor. As a result of the analysis, a very interesting fact came to light; a relatively small competitor with only four to five customers was doing an outstanding job in all aspects of product and service. In fact, their ratings were the highest of any of the vendors listed. To make matters even more interesting, this company was for sale. My client now had valuable, proprietary information and was in a somewhat advantageous position to consider a decision about the possible acquisition of that competitor.

3. Survey data as advertising copy. J.D. Power & Associates does it with owner satisfaction data for new car buyers...why not take similar advantage of the area of strength pointed out in your company's customer survey data? While most organizations assume that the value of customer survey data is to point out areas of deficiency, survey results are often quite positive. It is not uncommon for 90+% of customers surveyed to report high levels of overall satisfaction. For example, a nationally known consulting firm surveyed customers over a three-year period. They found that 96% of their clients were totally satisfied and would choose that company again should a need arise. This information, which had been obtained by an independent

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Researchers can learn from ethnography

by Sally Ringo

Editor's note: Sally Ringo is president of Ringo Research Associates, Atlanta, GA

What, exactly, is ethnography, other than a term that more qualitative researchers are beginning to notice and consider as a tool? Ethnography is the research arm of cultural anthropology—"the study of man." Since anthropologists have been studying man for several centuries—compared with the several decades for today's researchers—it then makes perfect sense for market researchers to borrow from the vast and brilliant body of literature used by anthropologists over the years.

Can we benefit from ethnography by increasing our knowledge of this somewhat esoteric and extremely rigorous methodology? Is it worth the discipline, cost, and effort that it would require to become fluent in the subject? Why should market researchers listen to and learn from what could be the latest fad in research methodology?

One, because if it is respectfully used, ethnography can enable us to study consumers—and delve with much greater depth—into the meaning of their behavior. And two, we can do this with a heightened degree of our own objectivity. As qualitative researchers we constantly strive to achieve the greatest honesty in these two very important factors—meaning and objectivity. Ethnography gives us the chance to step outside our own narrow viewpoints—our unique world views that we have created and inherited, as individual as snowflakes—and see our subjects with fresh vision.

Plus, ask yourself, how often are we able to take the full, "big picture" of the environment where our products are supposed to fit, to fill a need and to add some value to the life experience of our target consumers? How often are we able to look at our markets as if we were seeing them for the first time? Ethnography—which is as applicable in business-to-business scenarios as it is in consumer research—offers a structure for doing this. How can we as researchers benefit and improve our work by using ethnographic techniques?

First, learn a few of the fundamentals about the subject and then begin your own search through the vast body of literature on the topic. For those of us not fortunate to have taken anthropology courses in college, one must begin a rigorous self-taught course in the basics. Begin here.

Three key aspects

Essentially, ethnography studies three key aspects of humans—what people do (behavior), what people know (knowledge) and what people use (products). Note the similarity to what we do in market research. By observing these aspects in great detail—ethnographic studies can last for decades—the ethnographer successfully captures the elusive meaning of "meaning" in the complex culture of consumers' lives.

"Meaning" assumes cultural inferences that researchers rarely notice due to their own lack of understanding about the word "meaning." There are two crucially important levels of our consciousness that describe the meaning of an event: explicit meaning and tacit meaning. Explicit meaning is easy, it is everything we see and hear. A man in a haberdashery tries on four hats and chooses one to buy. Explicitly, he liked that hat. Explicitness can be seen as the "what" of a purchase experience and is more easily captured using quantitative research.

Tacit meaning is somewhat more slippery and falls into the realm of qualitative research. Tacit meaning relies upon inference and intuition. Great tacit explorers are those who appreciate the unspoken modes of communication as well as those who successfully tie bits and pieces of general knowledge together in synthesis. To explore tacit-

ness is to expose the answer to "why" a behavior is performed in all its glorious ramifications. Tacitness, too, conveys some of the complexities of human behavior.

Dick Tracy

The gentleman above chose the hat because he thought he looked like Dick Tracy in it—not the Dick Tracy those of us on the dark side of forty recall, but the new Dick Tracy, Warren Beatty. And what meaning does the symbol "Warren Beatty" carry in our culture? (This is tacit cultural knowledge). The stud of Hollywood, who our dapper shopper would like to emulate when he logs off his computer (he's a newly coined CPA in a moderately-sized firm in a moderately-unsophisticated Southern city) on Friday night to hit the streets for romance and adventure.

To understand the real meaning of the man's hat purchase, the ethnographer would examine the words: like, hat, Dick Tracy, Warren Beatty, romance, clothes, symbol, and so on. A technique called domain analysis would be the next step in this inquiry into the meaning of the hat purchase.

Tacit can also be explained by saying it is behavior that a newcomer to a culture would not quickly understand. Ethnography is, then, essential for international market research and any studies that examine new markets.

Here is another example of tacit knowledge. Body language is used a great deal by respondents in group and one-on-one interviews, hence the one-way mirror. When a group of people who share a similar culture—say, supermarket deli managers—issue a group-wide but silent message by rolling their eyes and scrunching up their faces, great tacit knowledge as been shared. This body language appeared in a focus group after the moderator asked respondents if their customers had ever dispensed soup from self-serve containers, a seemingly straightforward question. This reaction occurred across the entire set of six groups but was explained in the first. The rolled eyes

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Quirk's
MARKETING RESEARCH
Review

P.O. Box 23536
Minneapolis, MN 55423

Business world names its 20 hottest topics for 1992

Health care insurance and costs. Home remodeling and home centers. The Americans with Disabilities Act. Fitness and exercise trends. Biotechnology in the food industry. What do these five topics have in common?

They were the five major concerns among American business executives in 1992. Accordingly, they were designated the most popular business topics of the year on FIND/SVP's Business Barometer. Published by the New York City-based consulting and research firm FIND/SVP, the Business Barometer is a monthly ranking of the 20 subjects most on the minds of its 11,000 executive clients.

According to Andrew Garvin, president of FIND/SVP, health care in the United States has been a significant concern for all American businesses, and its appearance at the top of the list came as little surprise. Client companies from all sectors of industry, from small to large, are directly affected by rising health care and insurance costs.

FIND/SVP fielded numerous questions on other firms' health care plans, health care in the United States and abroad, federal policies, statistics on the uninsured, and how to contain health care and insurance costs for their own companies. The topic has been hot for some time now, but interest skyrocketed during the presidential primaries and after the election of Bill Clinton, Garvin says.

Home remodeling/home centers was the second most popular topic in 1992, which was also one of the hottest topics the year before. Its continued popularity is attributed to the recession, since a large percentage of Americans either cannot afford to buy a new home, or in the current economic climate, won't take the risk on this kind of investment. Instead, it's becoming quite common to refurbish, redecorate, repair and maintain existing homes. If the trend continues, markets as varied as furniture, textiles, doors, and carpentry will be affected positively. The trend also invigorates the do-it-yourself market, which has become a growth market in the 1990s. FIND/SVP has examined an array of related issues, primarily products, trends, and leading home centers.

Third on the hot-topic list was the Americans with Disabilities Act. This is a federal civil rights law that guarantees unbiased treatment of the disabled in the workplace. Initial ADA regulations went into effect in July for firms with more than 25 employees; those with fewer workers have until July 1994 to comply. The law affects all companies, and aside from information on specific rules and regulations of the ADA, other key issues include training programs, personnel policies, job descriptions, and safety procedures and practices.

Fitness and exercise trends was another hit of 1992, ranked fourth. The fitness craze that began a few years ago has not yet died down, and FIND/SVP president Garvin expects that trend to continue. In-line skating in particular took off this year, while golf seems to be the rising sport of the '90s. It appears the next wave will include exercise machines, like innovative stair-climbing equipment.

Fifth most popular was biotechnology, especially in the food industry. The continued application of bioengineering techniques, such as gene splicing or cell manipulation, yield higher quality products like leaner pork prod-

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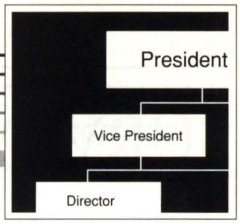
NAMES OF NOTE



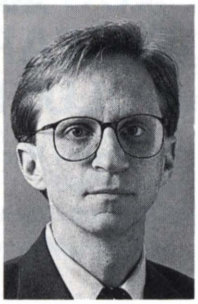
William Moult has been named chief executive officer of *ASI Market Research*, New York City.

John Vanderhoof has been promoted to field research director at *Chamberlain Research Consultants*, Madison, WI.

Ken Benjamin has joined *Healthcare Communications, Inc.*, a Princeton, NJ-based health care promotion research firm, in the newly created position of senior vice president/planning, research & development. **Bill Moos** has joined the company as vice president/marketing. In addition, **Tybe Marks** has been promoted to client services specialist and **Erika Perzi** joins HCI's Client Services Department as advertising rate card coordinator.

Karen Predow-James has been elected to the board of directors of *Market Facts, Inc.*


Predow-James


Luker

Richard Luker has joined *Chilton Research Services*, Radnor, PA, in the new position of account executive.

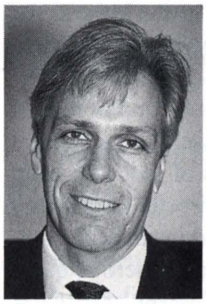
Simmons Syndicated Studies has named **Anna Fountas** president.

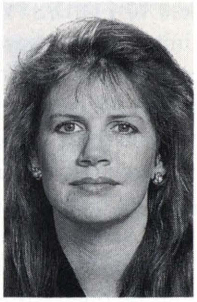
Dunlap "Scotty" Scott, previously of Gikas International and Quality Controlled Services, has joined *Consumer Pulse, Inc.* as director of the Consumer Pulse of Denver operations.

Village Marketing Research, Skippack, PA, has added **Peg Bauder** and **Jane Genuardi** as research assistants.

Troy, NY-based *MapInfo Corp.*, a developer of desktop mapping software, has promoted **Randy Drawas** to vice president, marketing communications.

Aaron Grossman has become a partner in the New York City based research firm *Newman-Stein, Inc.* In addition, **Cate Cleary** has been promoted to vice president.


Grossman


Cleary

Walker: Research & Analysis, L.P. has a new president, **Thomas King**, and a new management team: **Linda Tessar**, v.p., custom research west; **Lee Markowitz**, marketing sciences director; **Kimberly Graham Lee**, v.p., new product development; **Santina**

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RESEARCH COMPANY NEWS

Market Segment Research, Inc. has opened a new office in Manhattan at 369 Lexington Ave., 2nd Floor, New York, NY 10017. Phone 212-867-9116. Fax 212-557-3085.

◆

Chicago-based **Information Resources, Inc.** has entered a letter of intent to acquire Panel Pazar Arastirma A.S. ("Panel"), a provider of retail audit information services based in Istanbul, Turkey. Terms were not disclosed.

◆

Research 100, Princeton, NJ, has formed a new business division to service clients who are targeting the 50-plus consumer segment. Called S.M.A.R.T. (Specialized Marketing and Research Targets), the division will focus on senior consumers. Candace Stephenson Corlett will be president of the division.

◆

Perception Research Services has moved to new offices at One Executive Dr., 1st Floor, Ft. Lee, NJ, 07024.

◆

Leibowitz Market Research, Inc. has added two new focus group rooms to its facility in Charlotte, NC. This addition expands the facility to four rooms, a one-on-one room, a multi-purpose room, test kitchen, client lounges and observation rooms. For more information call Teri Leibowitz at 704-357-1961.

◆

Greenleaf Ascts., Inc. has moved to Watermill Center, 800 South St., Waltham, MA 02154. Phone 617-899-0003.

◆

HWEvaluations has relocated to 1180 East Broadway, Ste. 6, Hewlett, NY 11557. Phone 516-374-4908.

◆

Village Marketing Research has opened an office at The Courtyard at Skippack Village, 3900 Skippack Pike-Box 1407, Skippack, PA 19474.

◆

Walker: Research & Analysis, L.P. has relocated two of its client service offices and opened a new client service office. The San Francisco office has been moved to 1990 North California Blvd., Ste. 350, Walnut Creek, CA 94596. Phone 510-906-1510. Fax 510-938-9399. The Princeton, NJ office has been moved to 103 Carnegie Center, Ste. 315, Princeton, NJ 08540. Phone 609-452-1822. Fax 609-452-2284. The new Chicago-area office is located at Riverwalk, 2150 E. Lake Cook Rd., Ste. 60C, Buffalo Grove, IL 60089. Phone 708-465-9414. Fax 708-465-9543.

Newsletter for health care promotions

Healthcare Communications, Inc. (HCI), a Princeton, NJ-based promotion research organization, is now offering The HCI Communicator, a free newsletter for the pharmaceutical and related health care industries that focuses on current and long-standing pharmaceutical promotion issues. To obtain Volume 1, Number 1 and add your name to the mailing list, call HCI at 609-452-0211.

Reports summarize opinions on trade shows

Trade Show Bureau has released the research reports, "The Power of Trade Shows: An Examination of Attitudes and Perceptions toward Trade Shows among Decision Makers" covering six industries: computer/high tech, food and beverage, gift and apparel, hospitality/service, manufacturing, medical. The data is part of a research study conducted by Simmons Market Research Bureau with over 1,000 purchasing decision makers. The report format includes a narrative style summary, support charts and graphs, plus a complete set of tables for each question of the telephone surveys. Profiles of trade show attendees by job title, function, purchasing authorization, and their companies' size in number of employees and annual sales revenue are also included. The primary questions answered by the research are: What are attendees' current perceptions and attitudes about trade shows? How important are trade shows to business decision makers? How satisfied are these buyers with trade shows compared to other purchasing information sources? For more information and prices call 303-860-7626.

New magazine for users of GIS

Business Geographics, a bimonthly magazine devoted to uses of geographic information services (GIS) and geodemographics in business, is now available free to qualified recipients. The magazine is a response to a major trend toward improving the use of geographic information by numerous industries. It is published by GIS World, Fort Collins, CO. For more information call 303-223-4848.

Simmons data on buying habits of computer professionals

Simmons Market Research Bureau, Inc. (Simmons MRB) now offers CompPro, a comprehensive study of computer professionals. The study provides information on all print media habits, purchase influence and the decision-making process for the computer equipment in companies with 100 or more employees. The computer professionals in these business establishments number 517,982. For all of these professionals, information is now available on a range of products and services. The study reports on 150 computer product categories, the 57 manufacturers who produce the bulk of the hardware and software and 98 specific brands. For more information call 212-916-8900 or write Simmons MRB, 420 Lexington Ave., New York, NY 10170.

Syndicated study of warehouse clubs now available

The M.E.A.L.S. division of Bruskin/Goldring now offers Warehouse Club Shopper Close-up, a new syndicated study which will provide suppliers and retailers demographic and purchasing information about warehouse club shoppers. The study will also probe shopper awareness and issues such as product satisfaction, brand identity, and unmet product needs. Users of the study will be able to identify warehouse club members by business or personal use, age, sex, income, and geographic region. Data on the frequency of shopping at clubs, which clubs are visited, purchasing patterns, amount of purchases, and categories of items bought, such as groceries, beverages, distilled spirits, furnishings, and apparel are also available. For more information call Peter Berlinski at 908-572-7300.

Analyze scanner data in Windows

Information Resources, Inc. has announced a Windows-based marketing program—pcDataServer for Windows, a PC-based application that provides marketing decision support in the Microsoft Windows format. Designed for sales and marketing professionals in the consumer packaged goods industry, pcDataServer for Windows provides marketers with access to volumes of scanner data and information for developing marketing and brand strategies. Users can retrieve scanner data, view and analyze current marketing information and perform competitive analysis through linked report and graph windows. For more information call Lisa Gundlach at 617-890-1100.

SRI releases updated VALS

VALS 2+, an enhancement to VALS 2 market research typology, is now available from Menlo Park, CA-based SRI International. Although the key dimensions of VALS 2—self orientation and resources—remain the same, the VALS questionnaire and classification algorithm have changed. The original VALS

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is characterized by longer lead times, lower prices and larger orders.

"The dimensions and dynamics of the sales of the two different types of papers are very different. That caused us to look at organizing our company into two distinct business groups, one of which would sell premium cover and text papers (under the Hopper, Nekoosa, Proterra, and Velorum brand names) and the other part of the division would be our uncoated free sheet division and would become known as Georgia Pacific Papers," Murray says.

"We would then be able to manage our manufacturing facilities more in line with the needs of each of these individual businesses rather than trying to put in a 'one size fits all' approach when one size really doesn't fit anybody. That's what came out of those research findings."

"Our learning indicated that we needed to focus ourselves against those two businesses and divide our product line and sales force accordingly," says Frank Perkowski, director of marketing services, Georgia-Pacific Papers.

Benchmarks

The telephone interviews with printers and office paper buyers lasted approximately 20-25 minutes and consisted of a range of questions designed to get a benchmark on awareness of Georgia-Pacific as a company and of its brands and also those of competitors; respondents also rated the brands on key dimensions that were important to them.

"The second phase of research was to figure out, now that we have these two businesses, how do we position ourselves?" says Perkowski. "What's our competitive edge? Where are our weaknesses? If we have gaps in the product line, what products do we need to develop? If we have redundancies, which products should be deleted, which brands should we maintain or discontinue?

"We looked at the key dimensions that were important to them in terms of suppliers and we asked them to rate each of the suppliers against those criteria. We also got into questions about what would convince them to choose one supplier over another, what promotional programs or concepts they would find interesting. One of the things that came out of there was that there seemed to be an opportunity to encourage trial and repeat purchase through promotion. We had never done anything like that so that gave us some rationale for doing things like offering rebates and holding sweepstakes with end users of our products.”

High recognition

The research showed low awareness levels for many of G-P’s brand names. But the Georgia-Pacific name had high awareness and recognition among a broad array of customers and external groups. “As a result, an identity was developed that would leverage the Georgia-Pacific name and create ‘Georgia-Pacific Papers’ as a superbrand,” Perkowski says.

“What emerged from those studies were some pretty clear findings. In the case of the basic everyday papers, what was important to customers was that there was a reputable company behind these papers. That gave them confidence in the paper. We discovered that Georgia-Pacific had a good image with printers and large companies that buy paper. So instead of marketing ourselves under six or seven different brands, it was clear we should focus on Georgia-Pacific and make sure that we communicate to these people that G-P is a big company and that we have all the resources to make quality paper and the clout to get the paper to them economically.

“What emerged from those studies were some pretty clear findings. In the case of the basic everyday papers, what was important to customers was that there was a reputable company behind these papers. That gave them confidence in the paper. We discovered that Georgia-Pacific had a good image with printers and large companies that buy paper.”

“Looking at ourselves relative to the competition we found an opportunity to position ourselves as a state-of-the-art paper company. Users want to make sure that the paper is consistent and that a quality control system is in place. Nobody was positioning themselves that way.”

Premium papers

For the premium papers, the objectives of the research were to understand the buying process for text, cover and premium offset papers; to assess industry impressions of Hopper and Nekoosa; and to assess the feasibility of consolidating Hopper and Nekoosa brands.

"In the research," says Jim Miller, director of marketing, Hopper Papers," we really went through the whole chain of the buying influence from the distributors—who are the initial customers—to their customers, who are the printers and designers. We wanted to get a good feeling for how Hopper and Nekoosa were perceived right now, not only by them as customers but their impression of how their customers see Hopper and Nekoosa. We got a lot of input about current perceptions of the products and some insights into how we might improve them in the future.

"In the focus groups we looked at aided and unaided brand recognition and got some perceptions of the quality and value and so on that were put in the brand name. We wanted to elicit feelings about those brands and the companies that make them, both at the printer level and the designer level. Designers had more recognition of Hopper, which has been a cover and text brand for a number of years. The Nekoosa brands were more familiar to many of the printers; that's more how they've been marketed, as printer house brands."

The research found that the Hopper and Nekoosa brands were looked at as established brands with solid reputations, but there was a near consensus that the product lines needed a shot of vitality.

Quantum Leap

To give the premium papers some of that vitality, G-P began Quantum Leap, its code name for efforts to redesign the premium paper line. "The name Quantum Leap is appropriate because the scope of the change we're making is tremendous. We're literally changing every product line we have, eliminating overlapping products, coming out with new products at the same time, changing colors and making all of our product lines compatible," Miller says.

"The research told us we needed to completely upgrade our products from a color standpoint so we have launched new products that will reflect a whole new color system. Under the Coloractive system, all of our products are designed color-wise to work together from a design standpoint to help buyers simplify their color selection process while at the same time offering them a great amount of choice.

"It's all been driven by market research. Premium papers is a fashion type business, you're dealing with colors and textures and your buyers are graphic designers so it's important that we keep on top of trends in color. We want to make sure we stay on top of that so we're forming panels of designers in three major markets for ongoing input on color selection, promotional materials, everything involving our business from our customer's standpoint."

Designers & printers cooperate

One surprise from the research, Miller

says, was the degree of cooperation between designers and printers in choosing colors and papers.

"It's very much of a team effort between the graphic designer, who may have some thoughts about the colors they need, and the printer, whom they consult to determine the reliability of the product, how it runs on the press, and pricing. Together they come to a decision on the product they're going to buy. The research revealed a lot more cooperation than we might have guessed."

New logo

Another product of Project Eagle was new packaging for Georgia-Pacific and Hopper papers which uses a similar design for both the Hopper and Georgia-Pacific names. "The packaging program had a two-fold objective, we wanted to make these two businesses appear to be part of the same company but also give them a different image," Perkowski says.

Frank Murray: "Using the logo and the new packaging to make a product line go from two competing products down to one, we end up with a more full product line, top to bottom, to offer the marketplace. We can truly now be a one stop shopping center."

The new packaging includes a new logo, which adapts the existing Georgia-Pacific "Blue Tree" logo into a more high-tech image. Accompanying the logo is the new name "Georgia-Pacific Papers," which will be used on all business and printing paper products. New black and white packaging for the paper products was also created to give the Georgia-Pacific products a distinctive image.

"The packaging is unique, which will separate G-P from the pack, while the logo offers a modified version of the well-known G-P corporate tree in a new high-tech, highly professional, paper-oriented configuration," Perkowski says.

In designing the logo, says Bob Wages, president of Wages Design in Atlanta, a great deal of in-the-field research was done. "We decided

Georgia-Pacific Papers

Georgia-Pacific

Project Eagle's research resulted in new packaging, which includes a new logo (top) that adapts the existing Georgia-Pacific "Blue Tree" logo (bottom) into a more high-tech image.

on black and white because it's distinctly different from the colors used by G-P's competitors. Even the way the colors are used is different. Visit any merchant warehouse and you will see that most paper companies used color tops and white bottoms on their cartons. We flipped it; the top will be white and the bottom black, giving the overall carton a striking look in warehouse and office environments."

Structure distribution

An important part of Project Eagle was to determine how to structure distribution of the company's products. Key to that effort was obtaining an estimate of paper usage on a market-by-market basis. "We set out thinking that surely someone had crossed this bridge before," says Steve Fowler, manager, marketing research, Georgia-Pacific. Unfortunately, no one had. Industry statistics weren't detailed enough and at that time there were no private sources offering the information they sought. So, G-P turned to a consulting firm to compile information on the sales, market share, product lines carried, etc., of the merchants it works with.

"Once we had an estimated tonnage share for each of the merchants," says G-P's Frank Murray, "we took a look at our own requirements to move the tons that we manufacture and used that as a guiding principle to figure out how to go to the marketplace and create a business-to-business distribution network where we didn't have everybody selling our paper in one form or another but we had enough people selling it so that we could move all of our capacity. We would have some selectivity, if you will, and yet assure ourselves of sufficient market access to move all the tons."

"Through market research we wanted to bring objectivity and remove emotional and historical baggage from business decisions that are going to affect how and with whom we do business in the future. We used market research as the equalizer in our decision making processes."

Driven by research

The decisions around all of these moves that Georgia-Pacific Papers has made were driven by market research, Murray says. "Through market research we wanted to bring objectivity and remove emotional and historical baggage from business decisions that are going to affect how and with whom we do business in the future. We used market research as the equalizer in our decision making processes.

"What Project Eagle provided to Georgia-Pacific was a greater understanding of the marketplace, our standing in it and a methodology for extending the appeal of our products and services," Murray says. "Key to this strategy is the positioning of Georgia-Pacific as a superbrand, which would extend the user's positive image for G-P across our entire product line, as well as differentiate our products from all others in the marketplace.

"In final judgment will this project be successful? We won't know the answer to that for several years. Any cake this big takes a long time to bake. But we feel very proud and positive about the progress we've made to date." ❑

Contacts

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an order based on a UPC code and bring the lenses to the operator as opposed to the operator going to the lenses. That seriously cuts down on pulling errors and speeds up the process of getting the lenses packaged and sent out."

Quadrant analysis

One aspect of working with Lakewood Research that has been helpful, Moritz says, is the research company's use of quadrant analysis, in which attributes measured in the research are displayed as dots on a diagram showing both their importance to customers and the customers' appraisal of the company's performance in meeting expectations. (For more on quadrant analysis, see this month's installment of "Data Use" on page 10.) The quadrants are typically divided into sections of high importance-high performance, high importance-low performance, low importance-low performance, etc. "The quadrant analysis allows you to become very focused very quickly. It allows management to see which dots are in the high importance-low performance quadrant and put together a plan to get out of that quadrant. Period."

As an example, Moritz cites the attribute "easy to place orders." "That dot showed up in our original external research three years ago in the high importance-low performance area, so we made the kinds of process changes internally that allowed us to fix it so that doctors perceived that it was easy to place an order when you dealt with W-J and thus move the dot over into the high importance-high performance quadrant."

An added benefit of quadrant analysis is that it helps with the politics of determining which service areas and processes within the company would be addressed by the TQM initiative, Moritz says. "When you start a major TQM effort, as we did three years ago, a lot of the executives want their processes worked on. The research helped us with

"This year we're going to go back and test the service characteristics to see if they're still the things that are most important to the doctors. We want to make sure we stay on top of things."

that because it defined for us what the one or two key processes were that we had to fix immediately in order to get our customers to perceive a major difference in service levels. That way people (within the company) don't feel like they've been overridden or passed over, or that TQM isn't working as hard in their functional area."

Identify errors

Another important pillar in constructing a TQM process is employee involvement. W-J has programs in place to involve both the front-line employees—those who deal face to face with the customers— and those in management positions in the TQM process. "The people who do the front-line work are almost always the most tuned in to the process. So without their input and their willingness to identify errors that occur in the process then you can't improve the process. Their involvement is absolutely critical."

Upper-level employees are involved through Lakewood's Quality Consortium, in which they rate the company's performance in the categories of the Malcolm Baldrige quality program, including leadership, quality of product, customer satisfaction, etc. "It's a good internal listening mechanism," Moritz says.

On the right track

The ongoing research shows that the company's efforts are working, Moritz says. "In 1990 when we did our qualitative research, W-J was ranked dead last in overall customer satisfaction out of seven major competitors in contact lenses. In 1992 we moved into second place, with the goal of course of being number one in '93. The research is telling us that we're on the right track. Listening to internal and external customers is absolutely critical to any successful TQM effort.

"Even though we've made these drastic improvements, the industry as a whole still has a long way to go in being perceived by their customers as meeting or exceeding their expectations every time they do business with us. Some of it is logistical; when you're dealing with so many orders and you've got to get that product out the next day, it's a nightmare. A lot of it is just the industry's inattention to customer satisfaction over the last 20 years or so. Recently it all came to a head and now everybody's scrambling to get caught up."

As the service levels in the industry rise, expectations may change, Lakewood's Gary Ballman says. "Expectations are rising; we see that in lots of industries. As certain manufacturers become more sensitive and begin to do better, the bar for performance standards is raised throughout the industry."

So while Wesley-Jessen works to satisfy its customers, the company plans to keep checking with them to make sure it's using research to measure the right attributes. "This year we're going to go back and test the service characteristics to see if they're still the things that are most important to the doctors. We want to make sure we stay on top of things," Moritz says. ❑

Understanding the mature consumer

by Leslie Harris

Editor's note: Leslie M. Harris is chairman and chief executive officer of Consumer Sciences Inc., Brookfield, Connecticut.

By the year 2000, America's senior population is projected to reach 76 million—one quarter of the total U.S. population.

By the year 2010, our senior population is expected to reach 96 million—one third of our total population.

Between the years 1990 and 2020, the 50 and older population is projected to increase by 76%.

In the 1980s, 100% of the growth in the mature market was among those over 65. In the next 10 years, it is estimated that 85% of the growth will be in the ages 50 to 65.

Marketers and researchers no longer can rely on the concept of a single senior group. Attempting to identify only one senior market (as in the 1980s) no longer provides a true understanding of the senior population. Today the senior population, which forms an estimated $900 billion market, is too diverse in terms of its stage of aging and other lifetime and environmental events.

Today's senior is living a more active and more positive life. Seniors who constitute this market want to live their lives to the fullest. They are open to buying new products, planning and engaging in new activities. Our maturing seniors demonstrate a declining interest in materialism. They place a higher priority on value than on price.

They are an active part of an information-driven society, reading newspapers, magazines, and books extensively. They spend a lot of time on self-improvement activities and in volunteer work helping others. They try to expand their knowledge of the society they live in and desire equally to contribute to that society. They want to continue to be productive citizens and for society to recognize them as such. They vote at a higher rate than any other age group and are more concerned with social issues than are those under 50.

- Many of the 50- to 64-year-olds have college degrees.
- Eighty-four percent read their daily newspaper.
- Seventy percent are magazine readers; more than half of the households have cable TV, and 56% own a VCR.
- Spending for education has increased as the population of 50-plus couples with younger children has risen.
- 50-plus women are returning to the work force in part-time positions, and there is a general trend toward learning new skills, both in vocational schools and colleges.

Success with seniors

The greater the level of maturity (age plus lifetime experience and economic status), the greater the likelihood the 50-plus population will seek to define a product's attributes using their individualized perceptions of need and desire.

Knowledge of the changing levels of maturity and the feelings, fears, wants, hopes, and dreams of the seniors can result in the ability to develop more predictive segmentation strategies and in the successful marketing of your company's products and services to the senior market.

The importance of maturing America is reflected even more in terms of per capita income and in spending for leisure activities. Per capita discretionary income (money left after the costs of food, shelter, and the other basic necessities have been paid) for the 50- to 54-year-old age group is $4,899; $5,759 for those 55 to 59; $6,188 for those 60 to 64; and $6,280 for 65- to 69-year-olds.

Mature Americans enjoy an average of 39 leisure hours per week. A majority (55%) believe it is a right they deserve. Travel ranks among the top leisure activities for men and women 50 and over. About one half of 50-plus individuals buy hobby-related equipment or supplies in an average three-month period and nearly 27 million subscribe to publications related to a hobby or to leisure time.

With greater financial well-being, and better health and emotional stability, people over 50 are more active and affluent than ever before. They enjoy stronger economic status, with attitudes, interests, and consumer behavior that is changing the meaning of aging to the American manufacturer.

Motivational factors

Traditional segmentation, based on demographic correlation with lifestyle patterns, has proven less effective in trying to understand the senior market than it has with younger age groups. The more mature market can more accurately be classified by motivational factors which are influenced by various psychological and sociological factors. Those who are less mature are more influenced by peer group values. Conversely, with increasing levels of maturity, peer group influence wanes.

When trying to understand the mature market, current thinking is to consider multiple factors such as cognitive age along with chronological age and other social and physiological factors.

In cognitive age analysis, the focus is on understanding how older customers think about themselves; when used in conjunction with chronological age and other factors this method has been found to be an effective means of segmenting the 55-plus population into more meaningful sub-segments.

Older adults who are cognitively young are often very much the same as middle-aged consumers in their buying

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Seniors offer numerous marketing opportunities

The spending power of the 50 to 64 mature market may be one of the best kept secrets around. The mortgage is paid off; they are in the peak of their earning years. In the 1990s, we are beginning to recognize that those 50-and-over represent a more diverse group, with lifestyles and buying patterns that differ significantly from the mature America of the past. With many products and services, what they buy is not markedly different than the under-50 adult. Increasingly, the mature consumer will buy products and services that emphasize the theme "you grow better with age."

Here are some snapshots of the consumption habits of this group:

Eating habits

- Every week 33 million 50-plus adults have lunch outside their home; 26 million have dinner outside their home.
- About one-third use a microwave to cook packaged frozen foods, side dishes, and snacks.
- Seventy-two percent consume coffee in an average day, and 54% are willing to pay more for premium brands.
- Fifty-one percent of adults 50-plus consume fruit juice in a typical day.

Apparel

- Forty-one percent of our 50 and older population believe that the label "Made in the USA" indicates superior quality.
- Forty-nine percent favor natural fibers versus synthetics.
- Each weekend, more than 10 million 50-plus adults shop for clothing items.
- Each month, 13.5 million buy cloth-

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Survey Monitor

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ucts and vitamin-enriched fruits and vegetables. Food and Drug Administration approval is not yet necessary for bioengineered foods nor are products required to be labeled as such. This relatively unregulated state has ignited much controversy in both the food and restaurant industries. The big question is, "Will people buy it?" The answer is being seriously considered by food companies, restaurants, advertising agencies and even investment firms.

Other topics on the 1992 Business Barometer were, in order of popularity: women's health issues, Total Quality Management, corporate downsizing, the 1992 election, multinational food marketing, the Clean Air Act, the recession, the North American Free Trade Agreement, frozen foods, warehouse clubs, home equity loans, cellular phones, Eastern Europe, alternate methods of distribution, and children's television.

The Business Barometer is based on a review of approximately 7,000 questions asked of FIND/SVP's consultants each month by 11,000 business executives from more than 1,700 client companies

Nightmare on Main Street — Americans' biggest fears

Americans are spooked by more than just things that go bump in the night. A lot more, like public speaking, financial problems, heights, and deep water, according to a nationwide survey of 1,000 adults, The survey, conducted by Bruskin-Goldring Research, Inc., of Edison, N.J., asked about the things of which nightmares are made. The results were compared to a similar survey the company conducted in 1973.

Speaking before a group is the top terror, frightening 45% of American adults; financial problems scared us most after that, along with fear of heights, both at 40%. A third get the shivers when they think of deep water. Those are the highest ranking fears, followed by dread of death, sickness, insects, and loneliness. Women showed higher percentages of fear than men in both the 1992 and the 1973 survey.

Over half the women (54%) and slightly more than a third of men (34%) fear speaking before a group. Twenty

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years ago this was the most common fear of both men and women. It is still the most dreaded among women, but has dropped to second place among men, who now fear financial problems most. More respondents from the North Central regional (55%) than the Northeast (37%) say this is one of their fears.

Financial problems, which worry one in four of the respondents, has jumped from fourth to second since the 1973 survey. The rise reflects the impact of current economic conditions. This is one of the few concerns which is almost equally shared among men (38%) and women (42%). Nearly half of the younger respondents (18 to 34 years old) are likely to have financial worries compared with respondents aged 50 to 65 (33%) or over 65 (16%). Respondents from the lowest and highest income brackets (under $15,000 and more than $40,000, respectively) worry less (36%) about money than those with household incomes between $15,000 and $20,000 (51%), while 46% of those with incomes between $20,000 and $40,000 cite this fear. Again, respondents from the North Central region (46%) are more afraid than those from the Northeast.

Towering heights give the creeps to 40% of adults. More women (50%) than men (29%) say they are afraid of heights.

Deep water scares 33% of respondents. Women again lead men, 45% compared with 19%. Regionally, people from the South are most afraid (42%); respondents from the West least concerned (23%).

Fear of sickness and death has increased since 1973, when 19% of respondents cited these fears. Now 31% of adults are afraid of dying and 28% fear sickness. Older respondents (65+) fear death less than 18- to 24-year-olds (37%). Women again take a slight lead (34%) over men (23%). The tables are turned when the subject is sickness. Respondents aged 65+ are more afraid (25%) than 18- to 24-year-olds (13%) of falling ill.

It may only be a bug, but 24% of adults say they are afraid of insects. Again, this concern is more common among women than men, as is loneliness. Over a quarter of the women responding feared being lonely, while 18% of the men said they worried about this. Flying, driving or riding in a car, dogs, darkness, elevators, and escalators are less common fears.

Consumers heed Mom's advice, eat more fresh produce

U.S. consumers are saying Mom was right. They report they are eating some fresh fruits and vegetables more often, notably broccoli, lettuce, carrots, apples, bananas and grapes. Why?

The appetite for lettuce, at least, is being inspired by year-round availability, the appeal of romaine and other leafy varieties, and the convenience of today's packaged salad mixes. Perceived nutritional value and consistent satisfaction with taste and quality in part are also working in favor of all those items.

Additionally, a national nutrition education program underwritten by the federal government's National Cancer Institute appears to be working. That program, also endorsed by the U.S. Department of Health and Human Services, is called "Five a Day...For Better Health." About 5 million households have moved toward the recommended five daily servings of produce in the past year, a consumer study shows.

The new study, called Fresh Trends 1993, was released by *The Packer*, a business newspaper serving the fresh produce industry, and Vance Research Services, a unit of Vance Publishing Corp. of Overland Park, Kan. The study reports that while one in five consumers is eating a specific fruit or vegetable more often because of its taste, health and nutrition concerns are driving consumers to buy a particular fresh produce item more frequently.

According to a telephone interview poll of 1,002 U.S. households, more than 40% of respondents volunteered health- or nutrition-related comments, including such answers as "[I eat the item] to get the potassium," and "[I'm using the item because I'm] doing a little more Chinese cooking—it's healthier."

Among those eating produce for a specific health reason—vitamin or mineral intake, calorie control, fiber, cholesterol concerns or cancer prevention—broccoli is the overwhelming food of choice. In all five areas, it is among the top four fruits or vegetables linked to better health. Apples and carrots also made each list.

Previous Fresh Trends studies have determined that perceived quality is the top reason consumers select an item in a store. The new survey finds that 34% of consumer households offer some complaint about quality. These include: the product is under- or overripe; shelf life is too short; and the product is not fresh enough. Thirty-seven percent of consumers offered no complaints.

About one in four overall complaints involves price. When asked specifically what supermarkets could do to encourage produce consumption, 40% of consumers mention price; quality-related comments are next, but only half as important as price.

One in six households believe that growers and producers themselves can help lower prices. Nearly the same percentage mention improved quality and reduced chemical usage as concerns. Forty-five percent say there's nothing growers can do to help encourage fresh produce consumption, or don't know what such strategies might be.

Other findings from the survey include:

• taste ranks third, behind quality and price, among general complaint categories;

• 15 million Americans who are aware of the "Five a Day" program have not responded to its call. Americans average 3.5 servings a day of fruits and vegetables (fresh or processed).

• Less than half of all consumers (42%) bought pre-cut or pre-mixed convenience produce in the 12 months preceding the study. Among those who have, however, there is a favorable level of allegiance to those products. Salad mix is the item purchased most often.

• Kiwifruit remains far and away the item tried most for the first time. Mangoes, carambola (star fruit), and green cauliflower follow. Kiwifruit and mangoes also are the top "ethnic or specialty" items purchased at least occasionally by consumers.

Fresh Trends 1993 polled 1,002 U.S. households in the Consumer Mail Panel of Chicago-based Market Facts Inc. The survey involved a 24-question personal interview, with most questions open-ended and unaided. The sample and results were weighted to be nationally representative of the U.S. population for househould size, population density, age, income and geographic region.

Games people play

In light of Americans' concerns about health and physical fitness, people are spending more of their free time participating in sports and recreational activities, according to a recent study.

The study by the Sporting Goods Manufacturers Association examined "frequent" participation, and found that a few activities are enjoying rising popularity with America's sporting public. Six athletic disciplines or equipment usage registered significant levels of double digit growth from 1989 through 1991. The stair-climbing machine came in first, up by a whopping 240%; next was the cross-country ski machine, up 127%, closely followed by in-line skating, which rose by 124%. Beach volleyball came in fourth, with growth of 112%. Basketball and treadmill use ran at a distant fifth and sixth, with increases of 62% and 55% respectively.

The SGMA , a trade association, defines a frequent sports participant as one who: exercises at least 100 days a year, or; plays individual sports at least 25 times a year, or; is involved in an outdoor/recreational pursuit 15 to 25 days a year, depending on seasonality. The association's Sports Participation Index is derived from a syndicated 15,000-household tracking study conducted by American Sports Data, Inc.

Ethnography

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meant "What a stupid question, everyone knows that consumers are too unsanitary to let near an open vat of soup in a grocery store." And, as in so many subcultures, persistent, culture-wide rumors add life to established tacit knowledge, such as the one about false teeth that were found in a vat of self-serve soup in some legendary, never-named supermarket. Whether it was true or not didn't matter. A strong tribal belief was shared by super deli employees across the country that would eventually impact soup vat manufacturers.

The scrunched up faces—expressing tacit knowledge—portended the doom one might suffer if she caught something unsavory from those unsanitary grocery store customers. The behavior expressed a tacit understanding shared by the deli employees and possibly not understood by members of the general public, including clients and researchers.

Enhance skills

Another excellent reason for learning and using the principles of ethnography is so that qualified researchers can continue to enhance their skills and reinforce their own professionalism in the midst of the unqualified. The explosive growth in the use of focus groups has been both good and bad for the research industry. On the good side, clients have gained an intimacy with their customers that surveys just cannot provide. Such insights arrive when groups are skillfully moderated by someone who appreciates tacitness, even if they are not familiar with the term or the concept. Sometimes these people are referred to as "non-linear thinkers" and their hallmark is a deep curiosity about most things and their ability to synthesize seemingly unconnected ideas.

On the bad side, too many groups are moderated by dreadfully unqualified people who lack training, interviewing experience, objectivity, sensitivity, vision, communication skills, and marketing knowledge. Horrifically, these people claim to be moderators. For example, a poor moderator might refuse to admit that he did not know the reason for the extreme reaction to a simple question about self-served soup. The skillful tactician is driven more by the need to understand, the deep curiosity great inquisitors have. A major failing of unskilled or untalented moderators is their lack of appreciation for tacit understanding of the distinct cultures studied in focus groups and depth interviews.

Cultural domains

Besides illustrating the effect that tacit knowledge has on cultural norms or behavior, ethnography also studies social situations and the behavior that occurs in them. Social situations can be any place where people come together for any reasons—shopping, transportation, work, worship, whatever. Every social situation has nine things in common, or nine major dimensions. They are: space, actors, activities, objects, acts, events, time, goals, and feelings. The relationships within these dimensions coalesce to form "domains" which can best be described as "a category of cultural meaning that includes other smaller categories."

"Descriptive questions" identify the major dimensions and examine the relationships among them in a studied social situation. Very simply, the descriptive questions ask, for example, "What is the space (we study)?" "Who are the actors?" "What acts are involved here?" "What objects are used?" "What activities are taking place?" "In what larger event are they taking place?" "What is the time frame?" "What are the actors' goals?" and "What feelings are being shown?"

Details need to be recorded by trained observers who show a healthy respect for tacit knowledge to document this data collection. These observations eventually develop into "domain analysis" with the goal to discover cultural patterns in the social situation. It is the patterns of behavior and expressions of inferences that give life to each subculture, that make each category of humans unique.

Various qualitative methods should be applied to study events and develop assumptions about consumer behavior. Transcripts from focus groups can be studied as social situations and elements of the conversation can be run through domain analysis. There are many more analytical techniques that can be applied, but they are too involving and numerous to mention here.

Essentially, ethnography aids the researcher in developing a question framework which results in a cascading list of further assumptions to test. Eventually, a grounded theory about the market event emerges which sheds light on the reasons people do the things they do. And, after all, isn't that what we researchers are all about?

Curious?

If your curiosity is piqued, begin your literature search, speak with anthropologists and consider co-managing a project with academic and government researchers, some of whom happen to be qualified anthropologists. Here is a short list of books that have helped me scratch the surface of this intriguing subject. "Research Methods in Cultural Anthropology" by H. Russell Bernard (Sage Publications, Newbury Park, Calif.) covers a great deal of territory and is split into three major subject categories: Part I: Preparing for field research; Part II: Collecting data; and Part III: Analyzing data. The textbook is a survey of various types of methods and does not go very deeply into explaining how to execute them.

James P. Spradley has written a set of books that go into great detail on how to conduct ethnographic studies. They can be used to guide your searches. One book, "Participant Observation" (Holt, Rinehart, Winston), shows the student how to do fieldwork using the method of participant observation. Its companion volume is "The Ethnographic Interviews." The fourth book to begin your ethnographic library is possibly already on your shelf. Anselm Strauss and Juliet Corbin's "Basics of Qualitative Research: Grounded Theory Procedures and Techniques" (Sage) gives the reader advice on how to make sense of the mountains of data collectable in any qualitative research study. Building a theory, grounded in the data, is—or should be—the goal of qualitative research and ethnography. ❑

Product & Service Update

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(Values and Lifestyles) program was introduced in 1978. VALS is the first system for psychographic market segmentation (i.e., defining people and groups by their values and demographics). The major changes included in VALS 2+ are: revision of the masculine scale resulting in a balancing of both masculine and feminine interests; introduction of a trend-conscious scale; Japan-VALS has been introduced into the U.S. framework; within the overall VALS framework, individual groups will exhibit additional behaviors based on the influence of the new scales. For more information call 415-859-5815.

CD-ROM database profiles biz affiliations

Corporate Affiliations Plus, a new database on CD-ROM from Reed Reference Electronic Publishing, provides profiles on over 100,000 companies. It will serve as the information link between more than 16,000 major domestic and foreign corporations and their 140,000 subsidiaries. The database will also provide comprehensive financial and personnel profiles for each company to formulate basic data on sales, revenues, net income, net worth, assets, and liabilities. The database combines data from the Directory of Corporate Affiliations—U.S. private, U.S. public, and international public and private—and the Corporate Finance BlueBook, with Reed Reference Electronic Publishing's Plus System software. More than 156,000 records on corporations and their subsidiaries, affiliates, divisions and joint ventures will be accessible for searches of company data such as:

• Complete corporate linkage—'who owns whom'

• Key personnel, as well as the company's legal firm, auditor, transfer agents, and other outside service firms

• description of each business—its sales, revenues, net income, net worth, assets and liabilities

• Contact information including addresses, phone numbers, FAX numbers, and SIC codes

For more information call 800-323-3288.

Names of Note

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Sullivan, v.p., corporate social responsibility measurement; and **Karen Connolly**, manager, marketing & planning. In addition, **Terry Erickson** will serve as director of the San Francisco client office. Account Group Manager **Robert McMahon** will head the Princeton client service office. And **Mary Smith**, account executive, will head Walker's new Chicago client service office. (See this issue's "Research Company News" section for more information on the new offices.)

Lisa Painchaud has been named director of media/marketing services for *CRE, Inc.*, an Indianapolis-based ad/marketing communications agency. In addition to overseeing the agency's media department, she will direct the newly formed marketing services department, which will offer market research as one of its services.

Painchaud

Ron Arden has joined the Stamford, CT-based research firm *Leferman Associates* as vice president for client service.

Ira Povlin has joined *Spagna Dunn Research, Inc.* as executive vice president. Povlin has served as president of Market Facts, New York and been a member of that company's board of directors. He will be responsible for his own account group at Spagna Dunn.

Customer Survey Benefits

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survey research firm, was used to considerable advantage in the company's advertising literature as well as their marketing strategy.

4. Pay for performance. Increasingly, customer satisfaction data is being used as a basis for calculating pay-for-performance bonuses. This is most often done to provide incentive to customer service personnel for delivering outstanding customer service (as defined by customer survey scores). It is also being done for top-level executives where the tie between what they do and how their performance affects customer satisfaction is much less clear. In the case of customer service personnel, the amount of bonus compensation tied to survey results is a few hundred dollars per quarter. In the case of executive level managers, the amount can be much greater.

5. Loyalty driver/market damage assessment. Most customer surveys stop short of asking customers about the likelihood that a negative product or service experience might cause them to switch to a competitor (market damage). Conversely, aspects of product or service that are most apt to cement a long-term relationship (loyalty) are seldom explored. Often, considerable value might be derived from knowing this information. Information on loyalty/market damage can underscore the importance of certain areas of deficiency, help to establish proper priorities, and actually predict the number of customers that might defect and the cost of those defections if identified problems are not corrected.

6. Performance reviews. The emphasis today is for all employees to recognize that directly or indirectly, they are serving their customers. The phrase is often heard, "If you are doing anything that doesn't have a positive impact on your customer, stop doing it." In spite of this, customer satisfaction data is used infrequently in the individual's performance appraisal or review.

Although few of my clients are using customer data as a basis for evaluating job performance, those that are have found real value. One limiting factor is that survey data often indicates satisfaction with a group rather than a particular individual. Even with this limitation, survey data has relevance and encourages teamwork and creates a common commitment to customer satisfaction.

In conclusion, customer surveys should be viewed from a broad perspective rather than just as a customer "report card." When designing your survey, look for ways to detect "blind spots," loyalty drivers, and potential competitive threats or opportunities. Similarly, explore ways to use your data as a basis for providing employees with feedback on their performance, or for rewarding them monetarily for a job well done. Invest the extra time on this front-end of your survey project to ensure that optimal benefits are derived. ❑

Senior Market

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and lifestyle characteristics. In cognitive analysis, the seniors who feel and act middle-aged can be responded to differently than the seniors who think of themselves as older.

Older adults who are cognitively young are not likely to act out the traditional stereotype. They think of themselves as 10 to 15 years younger than their chronological age. They think of themselves as "just beginning": They don't want to be considered homebodies; they are mobile; they enjoy traveling; they are alert and affluent. They dine out frequently and spend time reading best-selling books, shopping for new clothes, and buying gifts for their grandchildren.

Advertising viewed positively

The mature consumer's view of advertising is generally positive. They are pragmatic consumers who favor advertising that appeals to their intelligence. They will reject advertising that attempts to persuade by hyperbole rather than by providing information. Seniors want to be seen as active individuals.

- Fifty-eight percent think advertising that promises a money-back guarantee to be most believable.
- Fifty percent think advertising statements that offer the approval of a health or medical group to be most believable.
- Sixty-eight percent think those advertisements which carry celebrity advertisements to be least believable.
- Sixty-three percent think those advertisements showing interviews with a hidden camera to be least believable.
- Sixty-two percent think those advertisements describing the product or service as new and improved to be least believable.

Seniors approved of these ads:

- K Mart stores showing people of varied ages shopping together. Seniors are satisfied with K Mart advertising. They want to be included as part of the total market along with the middle and younger ages.
- Michelob's commercial with the tag line "The night belongs to Michelob." The tag line enables the seniors to perceive for themselves how the product might be, and how they would like to associate the product.
- Automobile advertisements depicting the satisfaction the car can provide rather than its performance characteristics.

Print advertising was found to most credible by the mature consumer. Three-quarters find advertising they read in newspapers and magazines to be useful and informative. Television advertising is considered to be less believable and less informative.

About 28 million adults 50 plus say they have purchased an item in the past three months from mail-order catalogues, toll-free 800 numbers, and television broadcast home shopping channels.

Research techniques

One of the most popular techniques that has been used in researching the older consumer is the focus group. The group typically consists of eight to 10 people and employs moderators who are experienced in conducting research with the senior market.

These groups are generally composed of users and non-users of the products or services over a range of demographic segments such as age, income, and education. The participants are further qualified on the basis of other sociological and environmental factors.

Photo sorts (picture representations of people of different ages and occupations), role playing, and other techniques are used to improve understanding of how the senior views a proposed new concept, product or service, and/or advertising promotion.

Focus groups have been utilized by banking institutions, retail and restaurant chains, travel organizations, clothing manufacturers, senior living environments, financial services, health care institutions, electronic equipment, cameras, automobiles, and recreational products.

Other research techniques have included in-depth interviews and "laddering" (asking for more information when a deeper level of motivation is desired). Mail surveys and personal interviews in the senior's home or in shopping malls also are used. Limitations of mail surveys include difficulty identifying the important non-verbal movements used when responding to a question. Personal interviews in the senior's home are costly.

Other considerations in conducting meaningful research with seniors are:

1) The ability to analyze the meaning of responses that consist of more than the literal meaning of the language.

2) Asking questions people understand. A diverse population can understand the same question differently, therefore their responses can mean different things.

An increasingly important challenge in conducting research with seniors is whether semantic and cognitive differences can limit effective communication and analysis between people of different ages, i.e., can a survey document be created for older respondents by someone who is not older? Second, can such a person be sufficiently sensitive to accurately analyze the answers?

Summary

In summary, the continuing physiological and socioeconomic change in the maturing adult has transformed the senior market into a highly involved and complex state of being from a lower level of activity, health, and resources.

Marketers and researchers can no longer focus on a single senior group. Older adults are becoming increasingly individualized. They are affluent and their general level of health is better than in the past. Most of all they want to be asked what they want, and they want to be heard. ❑

Sources

Interviews with David Wolfe, author of "Serving the Ageless Market," and with Jeff Ostrow, vice president of the Data Group's over-40 marketing division, were extremely helpful in the preparation of this report.

The source for much of the statistical information was a special report from Modern Maturity *magazine and the Roper Organization, and the U.S. Bureau of the Census.*

Other sources include: Guide to the Mature Market and the Mature Market Report published by Lifestyle Change Communications and American Demographics, *a publication of Dow Jones and Co.*

Additional input was provided by James M. Sears Associates, Clifton, New Jersey, and by Marketing Solutions Corp., Wayne, New Jersey.

Marketing Opportunities

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ing for their grandchildren.

Health and beauty aids

• Seventy-eight percent of adults over 50 think it is important to look their best.

• Fifty-five percent of women 50 and over use hair-care products on a regular basis.

• Fifty-four percent use hand creams or lotions.

• A majority use lipstick and lip gloss and about one-third use perfume, foundation makeup, and rouge each morning.

Home improvements and furnishings

• Fifty-three percent of those 50 and over own their home.

• Approximately 30 percent have undertaken major remodeling in the past five years, and six out of 10 have had major remodeling at some time.

• If cost were not a factor, one in four of those 50 and over would be interested in purchasing new furniture, carpeting, kitchen appliances, and kitchen cabinets.

Automotive preferences

• Thirty-eight percent of those 50-plus now drive a mid-sized car, and 34% say they are likely to buy a mid-sized car.

• The likelihood they will buy an American car is based on their loyalty to the "made in the USA" label, not to the car itself.

Vacation time

•Thirty-seven million adults 50-plus have spent close to $500 million in the past year on vacation travel.

• The same number have taken a vacation of five nights or longer in the last three years.

• Future choices include:

- traveling abroad (30%)
- taking a cruise (25%)
- visiting a beach or lake area (25%)

DIRECTORY OF QUALITATIVE RESEARCH/ FOCUS GROUP MODERATORS

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

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Contact: Lynn Grome
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Answers Research
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Contact: David Farlow
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Chamberlain Research Consultants
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Ph. 608-258-3666
Contact: Sharon Chamberlain
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LETTERS

Editor's note: This section is your space to comment on the articles that appear in the pages of QMRR. We hope it serves as a forum for the exchange of ideas on all manner of research topics.

When you write, please include your name, job title, company or organization name, address, and a phone number we can reach you at during the day. Letters may be edited for clarity or space. Send letters to: Joseph Rydholm, Quirk's Marketing Research Review, P.O. Box 23536, Minneapolis, MN 55423.

Blankenship & Breen have been helpful

I am in 100% agreement with your review of "State of the Art Marketing Research" by Al Blankenship and George Breen ("Trade Talk", *QMRR*, February). There are too many marketing research authors who either write esoterically to impress their colleagues/bosses or write as though research is highly fragmented and not part of a whole process.

I am an avid fan of George Breen, from his first book, "Do-It-Yourself Marketing Research" through his most recent collaborative work with Al Blankenship. The words and practical advice from George and Al have been extremely valuable to me during my 17 year career in marketing research.

I also enjoy reading about the "practical" applications of marketing research techniques in my monthly *QMRR*. Through your publication I have learned about unique research approaches and, additionally, made many research friends by contacting individuals cited in *QMRR* articles.

Keep up the great work, George, Al and the *QMRR* staff. We in the corporate world salute you!

Mary Ann Vlahac
Manager, Market Planning & Research
People's Bank of Bridgeport, CT

CLASSIFIED ADS

Trade Talk

continued from p. 54

fellow employees is important for them. Because there is less time available for investigating unknown brands, the respondents seem to be telling vendors to build their brand franchises, through advertising and by improving product and service quality. As the report states: "Trusted brands and sources will be more important because of the time scarcity in looking for and investigating unknown brands, the shift in job priorities and the increased need for quality in both products and services. Trust is simply a code word for quality and performance."

"Product has become a broader term," says Howard Gordon, principal, GRFI, Inc. "It may also include a high level of service. The buying decision makers today are buying the vendor's intellect more than they are the product because in many cases technology is advancing far in excess of our ability to consume it. Technology is in fast forward but our ability to use it is in slow motion. Many vendors may have to devote time to educating their customers."

The study report includes a story from the interviews to illustrate this point: "A very competent manufacturing engineer was given the responsibility for acquiring a new piece of machinery for the production process in her personal care products plant. When she met with a sales rep from a supplier company, the rep asked her what her objectives were for the new machine. While she could provide a general concept for the machine, she wasn't sure about the needed specs. The rep replied that he couldn't help her until she knew the specific objectives. She needed assistance with identifying the objectives but she didn't get any help from the rep. He said, 'Let me know when you have your objectives.' She subsequently purchased machinery from a company whose rep did indeed help her develop specific objectives. And the rep from the first company simply lost a sale—largely because he wouldn't educate."

Ignoring chain of command

As younger people move into buying positions they are changing the way things are done, the study found, by circumventing or ignoring the usual chain of command in the buying process and in the climb up the corporate ladder. In addition, to improve efficiency some firms are experimenting with methods of employee empowerment, which in this case means putting purchasing responsibility in the hands of "junior" employees. In terms of buyer behavior trends, 81% of buyers claimed a trickling down of decision making in their company. One buyer noted: *"People who work for me are making the decisions as to what they want to buy instead of my having to do it. I find myself signing a lot more regs instead of investigating and writing them myself."*

Another stated: *"We've tried to push a lot of decision making and smaller dollar items to lower level people. Everyone's been very responsive and productivity has increased. They can get a tool this week instead of waiting for the order to rest on somebody's desk for a month."*

Added importance

The study showed that the buyer-vendor relationship has taken on added importance. 36% said they are working with fewer suppliers. And some indicated that they are talking with their suppliers about "vendor co-destiny," inviting and allowing the suppliers to become more involved in determining the company's success.

"My biggest worry with suppliers is complacency—you have to watch out for the 'I-don't-do-windows' attitude. Vendor co-destiny is the key today..."

"There is a trend toward reducing your vendor base and establishing long term partnerships. We're aiming for a 50 percent reduction in suppliers."

When asked where they saw opportunities for suppliers to build supplier/buyer relationships, the respondents identified these areas (multiple responses were allowed):

- Build honesty/credibility/trust. (Cited by 47%)
- Strengthen communications/understand our needs/be an extension of us. (43%)
- Be a technology source. (34%)
- Concentrate on service/parts availability. (18%)
- Work on quality improvement. (15%)

The bottom line for business: know thy customer. ❑

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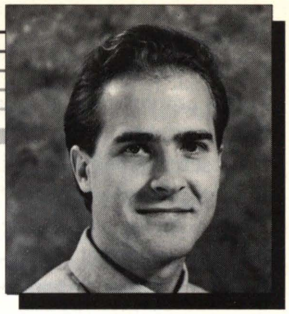

By Joseph Rydholm
managing editor

Message to business: know thy customer

A new study of business buyer motivation offers convincing evidence that the many factors recently at work in U.S. business, from downsizing to niche marketing, have changed the relationship between business and its customers, probably forever. The "Know The Buyer Better" study was conducted for Penton Publishing, a publisher of business, professional, and trade magazines, by George R. Frerichs Inc. (GRFI), Chicago. The study's objective was to "probe the chemistry of business buyers, explore their concerns and aspirations and how they are setting their own goals—all against a backdrop of a vastly changed business environment."

To do this, focus groups and one-on-ones were conducted in ten major markets with over 100 buyers and "buying influentials" in management, product development and design, operations and production in manufacturing and service firms. Industries represented include electronics, machinery, automotive, lodging, food service, pharmaceuticals, and consumer products. The sample was obtained from the circulation lists of various Penton publications.

The buyers talked about their work life, the shifts they see in job priorities, their relationships with associates, and how they juggle their efforts to help their company achieve its goals while working on personal goals.

In general, they feel time-poor/demand rich—which is nothing new. But the usual work-related stress has an added sense of urgency because of the gloomy job picture. In the past, if you didn't do your job, you were demoted or passed over for advancement. Today, it's more likely you'll be fired.

Some respondents reported that the lines between job responsibilities have blurred as staff reductions force people to "wear many hats" and perform more than one job function. For example, in the company of one respondent, R&D people are now a major part of the sales effort.

Build your franchise

The buyers said that they are spending more time on people-related issues (communicating, motivating, training, coaching) and less on technology or product concerns. Building relationships with customers, vendors, suppliers, and

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