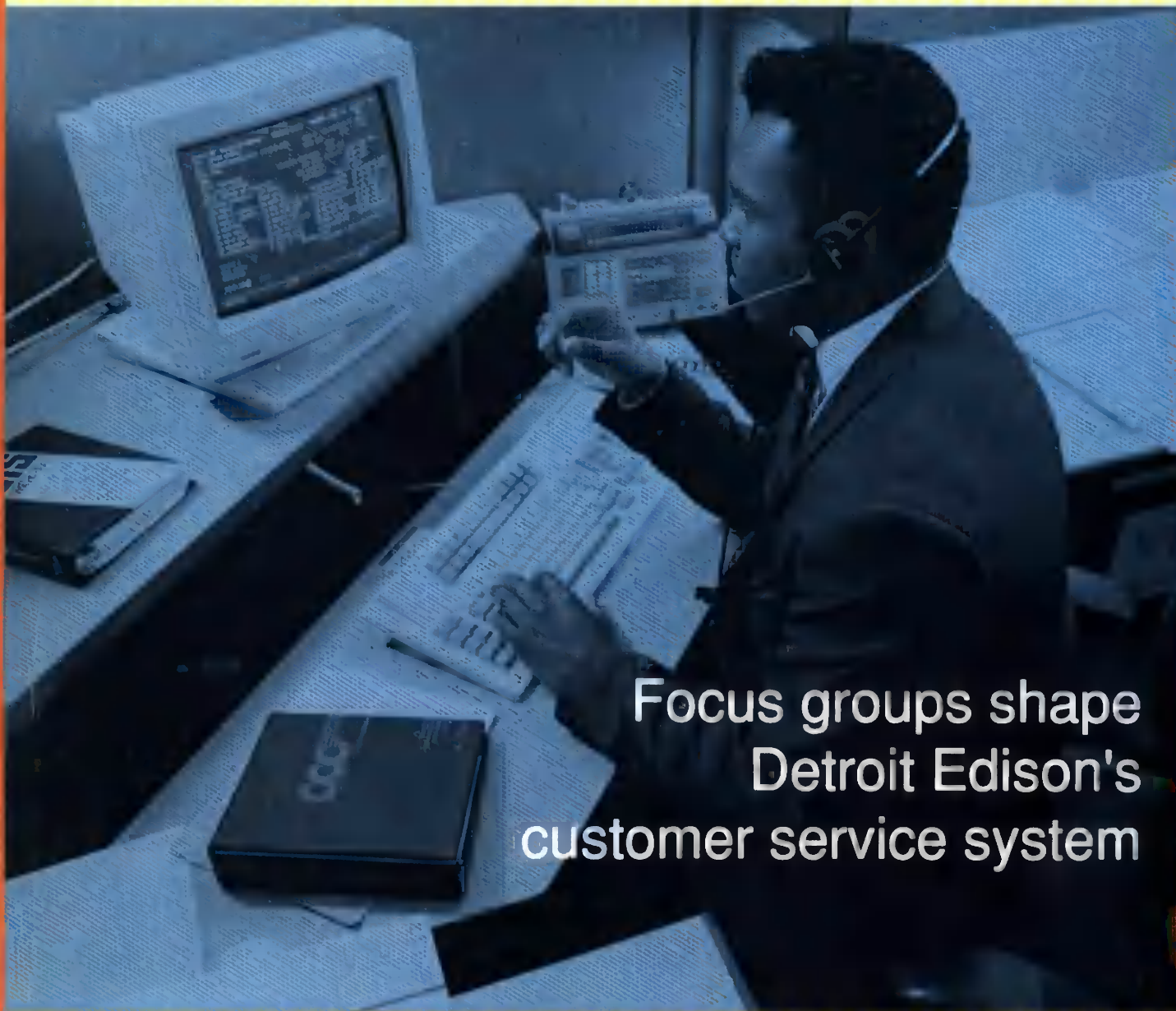


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Review



Focus groups shape
Detroit Edison's
customer service system

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Omnibus Studies*

June/July, 1993



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Focus groups helped Detroit Edison shape several features of its customer communication center. Photo courtesy of Detroit Edison.



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Restoring power

Focus groups guide creation of automated customer assistance system for Detroit Edison

by Mark Camack and Katherine Johnson

Editor's note: Mark Camack is president and Katherine Johnson is research director at The Corps Group, a St. Louis-based consulting firm serving the health care, utility and telecommunications industries. The authors were involved at the vendor level in the marketing research for this project. Camack moderated the interactive voice response system focus groups. Johnson assisted in the analysis and interpretation of the results for both the qualitative and quantitative portions of the research study.



tomers satisfaction. Detroit Edison's VRU played a key role in the company's larger overall plan to organize its Customer Communications Center—a consolidation of six telephone centers into one toll-free calling center—and to increase customer accessibility.

In 1991, the utility purchased a state-of-the-art voice response system. The system, from Digital

It's an electric utility's worst nightmare: Late at night, with only six customer representatives on duty, 10,000 customers lose their electric power.

This can mean big trouble for an electric utility, because the only time most customers call is during a power outage. The dilemma for the utility company is how to handle the thousands of incoming calls it normally receives when the utility has only a handful of customer service representatives available.

Like many other large utilities, Detroit Edison—which serves 1.9 million customers—faced this problem daily. Customers

didn't like waiting to report power problems, and Detroit Edison didn't like making them wait on hold—assuming the customer ever got through the constant busy signal.

But what was the solution? Detroit Edison selected the most natural technological answer, an automated, interactive trouble reporting system. In these systems, customers press touch-tone buttons to report the outage, or, in advanced versions of these systems, speak their answers into a voice recognition system.

The calls are then collected, routed and addressed in a timely fashion. Most important, the calls are *answered*, because such systems can handle up to 40,000 calls per hour. No more busy signals.

Companies install these interactive voice response units (VRUs) to improve cus-

tomers satisfaction. Detroit Edison's VRU played a key role in the company's larger overall plan to organize its Customer Communications Center—a consolidation of six telephone centers into one toll-free calling center—and to increase customer accessibility. In 1991, the utility purchased a state-of-the-art voice response system. The system, from Digital Equipment Corp., is the largest in the country at an electric utility. It can handle up to 42,000 calls per hour and can meet a variety of customer needs, including billing arrangements and service calls. Detroit Edison's VRU is also one of the few systems currently installed with voice recognition capabilities for rotary telephone customers.

Asked customers

But just how did Detroit Edison's management and engineers make the technological leap from busy signals to a VRU? It was simple—they asked their customers.

In 1990, Detroit Edison embarked on a comprehensive market research study to find out what its customers thought of it. Although this study probed hundreds of issues and produced several volumes of



With the installation of the voice response system, Detroit Edison's Customer Communications Center (above) can handle 42,000 calls per hour.

data, one central theme emerged: Residential customers placed a high value on accessibility.

Define and test issues

The residential phase of this research study began with qualitative research consisting of 30 focus groups. William Newbold, supervisor of marketing research for Detroit Edison, says focus groups were selected in this initial period because they can be a good way to define and test issues. "Focus groups can give something to show to management that is immediate," he says.

This initial phase formed the basis for the subsequent development of Detroit Edison's voice response unit. Detroit Edison held these groups throughout its service area and talked with a diverse customer base. The focus groups helped the utility generate a hypothesis: Customers were less angry about the loss of power than about lack of accessibility.

As the groups progressed, it became clear that customers were speaking with one voice: They wanted to be able to reach Detroit Edison when they had a problem.

Usually customers had to call dozens of times, then wait on hold, sometimes for 30

minutes or more, before they reached a customer service representative. When they finally did get through, the customer representative may not have had the outage information the customer really needed.

This scenario so frustrated customers that many eventually gave up and never bothered calling Detroit Edison during outages. But just because they didn't call didn't mean they didn't care. Subsequent quantitative marketing research corroborated this hypothesis, measuring the magnitude of customer discontent from Detroit Edison's inaccessibility during outages. This was a large and growing problem.

While qualitative research cannot be definitive, it can serve as a powerful demonstration of a company's willingness to listen to its customers. When a client is ready to listen, as Detroit Edison has, everybody wins.

contributing to affected customers' overall poor perceptions of Detroit Edison as an electric service provider.

Severe consequences

Both the qualitative and quantitative research findings strongly indicated that Detroit Edison should develop a solution to improve customer attitudes, or face severe consequences down the road. The quantitative research tested a potential solution to this inaccessibility problem. Customers overwhelmingly supported an automated telephone solution.

In the past, customer accessibility was a daily problem, not just during outages. Approximately 60% of customers who called got busy signals. Since the introduction of the VRU in March 1992, Detroit Edison reports that busy signals have been virtually eliminated.

But even the state-of-the-art system didn't address the critical issues of the system's user friendliness. In fact, many interactive voice response systems have been cumbersome, even downright frustrating, to use. The busy signal is often replaced by a new customer problem: how to deal with the

continued on p. 24

Omnibus study examines life in Russia

by David Leach

Editor's note: David Leach is vice president and west coast representative of SRG International, a New York City-based firm that specializes in conducting research outside the U.S.

In mid-1989 SRG International Ltd. established a relationship with the Institute for Comparative Social Research Ltd. (CESSI), a survey research organization based in Moscow. CESSI provides local support for Oxnard, Calif.-based SRG's annual Eastern European omnibus study and manages custom research projects for SRG in Russia and the other former Soviet republics. CESSI also conducts social and economic surveys for various Russian news media and institutions.

This relationship has provided SRG with data from some of the more recent CESSI surveys. When combined with the findings from SRG International's most recent omnibus study (November/December 1992), it paints a revealing picture of what life is like in Russia these days.

For the vast majority, life now is much harder than it was five years ago. For many, the future does not appear to be much brighter. When omnibus survey respondents rated their level of "personal life satisfaction" at the present time the average rating was just under four on a 10-point scale. (Ten was highest, one the lowest.) This compares with an average rating of nearly six when

asked the same question five years ago. Asked to look five years down the road, respondents didn't see much, if any, improvement—the average rating held at about four.

It comes as no surprise that the chief worry is the economy. More than half the respondents stated "general economic problems" and high prices as the most important problems facing Russia today. There are a substantial number of supporters for the move to a market-driven economy, but little confidence the current government can make it happen. And while nearly half approve of the move to a free market system, just

November 1992, however, provides insight that offsets this gloomy picture. While the hyperinflation situation has created hardship for many, the society overall has not been brought to its knees. One in five persons reported having enough money to buy everything they needed; three-quarters said they denied themselves things they wanted in order to get by. Fewer than one in 10 said they didn't have enough money to buy food.

In this same survey more than 80% felt the government's economic reforms either have not yet produced results or, worse yet, have had a negative impact. While generally in favor of the



about as many disapprove, about a quarter of them strongly.

A CESSI survey conducted in No-

privatization of business, agriculture and housing (about half to three-quarters of the respondents, depending on the seg-

ment), only a minority (34%) approve of price liberalization, a policy that appears to have reached deep into the pockets of nearly every Russian citizen.

No simple answers

There are, of course, no simple answers. When presented with a list of specific steps the government could take to improve the economic situation, four in 10 chose "work out a clear program of social and economic reforms," while five in 10 picked "stimulate production and not resale of goods." And four in 10 picked "actively fight corruption among bureaucrats," signaling frustration with government efforts to manage reform.

Despite the hardships and lack of measurable results, there are many who continue to support the social, economic and political reform programs. In the CESSI survey a significantly greater percentage *disagreed* with the statement "a market economy is not for us" (48% versus 37%), six in 10 agreed that "democracy is the best form of government," and a majority disagreed with the statement "The (old) social system should be restored." Many, however, are not willing to embrace capitalism as the sole answer to Russia's problems; more than 70% disagreed with the statement "only capitalism can save Russia."

Results from the SRG omnibus study tend to provide supporting evidence that not everyone is in favor of a free-for-all economy. Four in 10 thought those who start privately owned businesses should have the amount of their profits limited by the government. And about three times as many respondents favored a more controlled, Swedish-style economy, rather than one modeled on the United States or Japan.

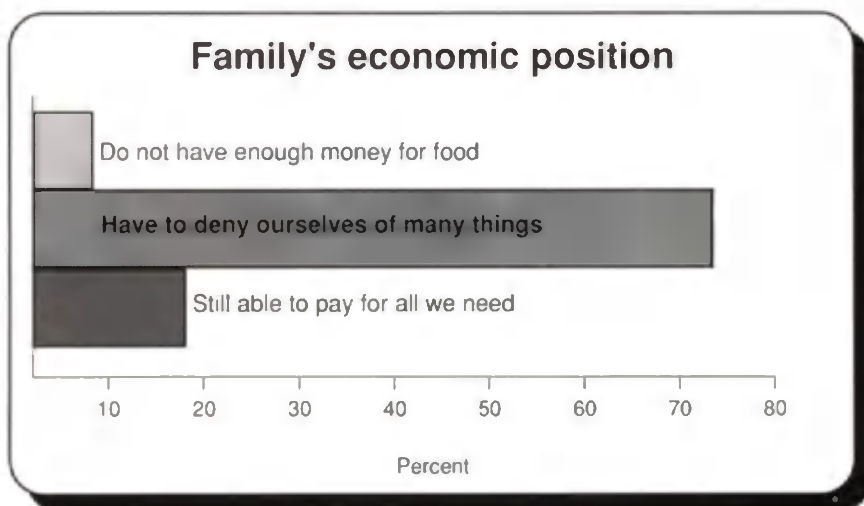
Little confidence in government

Most of the citizenry realizes, however, that the current government cannot be counted on to develop and manage the reform programs, and if their economic lot is to be improved, in the end it will be they who make it happen. The CESSI study found that 84% of

those interviewed had little or no confidence that the current government had the capacity to govern during this difficult transition period and 65% said outright that this current government would not succeed. President Boris Yeltsin's activities were rated at least satisfactory by nine out of 10 of those interviewed, but 70% were not sure that he was capable of solving the important problems.

With a now-dead centralized system and a government in which the people have little faith, many seem to have realized that the only way to improve their lot in life is to rely on their own industry and enterprise, and support

thought the job would get done by the year 2000. Feelings about the government's handling of the transition, however, were not as positive. Four in 10 approved of the main points of the overall program, but thought the details needed to be worked out, while another 40% said there was no program at all. About half supported the current economic program, but just as many did not, citing the cost to the people as the main reason. The price liberalization program is viewed as an important step in the transition process, but 66% of businesspeople realize that by allowing prices to seek their own level, particularly in a country where goods are in



from their families: nearly 75% picked these items from a list of 10. On the other hand, two-thirds felt they had no possibilities for improving their material status.

Business echoes public

A June 1992 CESSI survey of more than 900 top business managers echoed the general public's feelings. Nearly all the business people interviewed supported the move toward a market economy, with more than half favoring a gradual, controlled transition rather than a radical, speedy change. Two out of three felt a market economy would lead society out of its current crisis and into prosperity, and a like number

short supply and the distribution system is in shambles, poses a great risk.

The businessmen's attitudes toward privatization were also positive, on balance, but many thought there were deficiencies in government policy. Most of their complaints centered on the lack of a well thought-out plan, a lack they blamed on a rush to implement any sort of plan. About nine in 10 favored consulting Western experts, but the majority felt their own Russian experts should not be ignored.

Seeking views on broader economic issues, the CESSI survey found that the main economic problem in Russia today, as seen by these business man-

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TURF analysis

by Ed Cohen

Editor's note: Ed Cohen is president of Survey Perspectives, Inc., Baldwin, New York.

So what is TURF analysis? No! Nothing to do with either lawn care or horse racing! TURF is an acronym for "Total Unduplicated Reach and Frequency."

TURF analysis is essentially a statistical model, which had its start in media research. Media planners, seeking to maximize "reach" while minimizing media costs, needed information that would indicate the extent to which various media vehicles have overlapping (i.e., duplicated)—and, conversely, "mutually exclusive" (i.e., unduplicated) audiences.

For example, if Magazine X delivered an audience of 1.8 million readers, how much would the actual total audience increase if Magazine Y, with an audience of 1.4 million were added to the media mix? Or what would be the incremental audience gain if Magazine Z, with an audience of 1 million were added to both Magazine X and Magazine Y?

If we were to simply add up the three audience figures—totaling 4.2 million—and hinge our estimate on that number it would be misleading.

- Adding the three numbers would be misleading because there could be (and probably are) people who read two of the three or even all three magazines. These "duplicated" people would then be double- or triple-counted.

Further, assume the media budget only allowed for a buy in two of the three magazines. The question is which two of the three would maximize the media budget effectiveness, demographics and advertising rates aside for the moment?

Should we sum each of the various paired combinations (X+Y, X+Z and Y+Z) to determine which pair of magazines would yield maximum reach? The obvious answer, as indicated earlier, is no, because we still would not have an estimate of audience overlap and unduplicated audience.

Of course, media planners/buyers are continually faced with a far more complex array of media options than the three

noted above. TURF analysis is an indispensable tool in the decision-making, media selection process. While the TURF model was developed to measure the "total unduplicated reach and frequency" given various combinations of advertising vehicles, TURF analysis has been quite successfully adapted to marketing research.

What follows is a simplified exposition of how TURF analysis, with its impressively versatile range of applications, may be used to optimize a line of products, fragrances, flavors, colors or sizes.

TURF analysis for marketing research

Key Objectives

As noted, TURF analysis is employed in marketing research primarily to optimize product line candidates, fragrance, flavor, color and/or sizing offerings.

- One objective of TURF analysis is to identify the mix that will attract the largest number of consumers with the fewest number of entries or varieties.

- A second objective is to calculate the incremental value to the full line of adding each additional possible product or variant.

Example #1

For illustrative purposes, let us assume that a manufacturer is interested in developing two flavors of ice cream out of three candidates—Flavors A, B, and C—that have been suggested. Which of the two flavor combinations is likely to sell ice cream to the most people—AB, AC, or BC?

In fact, the number of candidates included in this kind of TURF study typically ranges between seven and 35 to optimize a group of two to 10 different product variants.

This hypothetical market research study involves 200 target market respondents screened in mall locations in five geographically dispersed markets. Each respondent is exposed to the three flavors—randomly presented to minimize

order bias.

Using a standard five-point purchase intent scale, respondents indicate their level of purchase commitment to each of the three flavors.

• The criterion scores may be either "top box" or "top two box" purchase intent scores, depending on their relative levels.

The TURF algorithm first examines the response pattern of each respondent, logging the level of purchase interest expressed in each of the three candidate flavors. That is, it determines which flavors are chosen by individual respondents.

• For purposes of this discussion, a flavor is "chosen" by virtue of generating a "top two" purchase box flavor interest: "definitely/probably would buy." Any single respondent may, of course, "choose" all three flavors, two of the three, a single flavor or none of the flavors.

This set of responses comprises the TURF database. The model then calculates the various choice combinations, i.e., how many respondents chose none of the flavors, how many chose only Flavor A, how many chose both Flavors A and B, and then Flavors A and C. Similarly, the process continues for Flavor B and then for Flavor C, determining the various choice combinations in continuous pairwise iterations.

For this hypothetical ice cream flavor illustration, assume the research yields the following distribution of "top two box" (i.e., "definitely/probably would buy") scores:

BASE:	DEFINITELY/ PROBABLY WOULD BUY
	(200) %
Flavor A	50
Flavor B	45
Flavor C	25

The customary, obvious, conclusion drawn from the data in Table I would be that the client should produce Flavors A and B, which generated the two highest levels of purchase intent.

But the TURF approach would lead to a different conclusion, revealing the following:

• Flavor A was chosen by 50%.

• Flavor B was chosen by 45%.

- 30% also chose A.

- 15% chose B exclusively.

• Flavor C was chosen by 25%.

- 5% also chose A.

- 15% also chose B.

- 5% chose C exclusively.

Thus, based on interest levels expressed for each flavor and calculated in a pairwise fashion for each of the three candidate flavors, the TURF data for the 200 consumers surveyed would indicate the following:

• 65% would definitely/probably buy A or B.

- 50% A and 15% who chose B, exclusively.

• 70% would definitely/probably buy A or C.

- 50% A and 20% who chose C but not A.


• 55% would definitely/probably buy B or C.

- 45% B and 10% who chose C but not B.

The TURF-based conclusion, then, would differ from the earlier one. TURF analysis indicates that the optimal pair of flavors is A+C, rather than the A+B suggested by the previous, more traditional analysis.

TURF analysis may also be used to determine the incre-

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mental value of adding successive products, flavors, et al: i.e., going from one to two, from two to three, three to four, n to n+1, etc.

For example, in this hypothetical case, adding Flavor B to the A+C combination would "definitely/probably" bring an additional 15% of the consumers to the client's flavors, thereby increasing flavor "reach" from 70% to 85%. Were more flavors brought to the mix, the 85% would very likely increase to some extent, but that growth may not cost-justify the additional flavors.

Put somewhat differently, if a line currently consists of two (or N) products, how much additional purchase interest is a third, fourth, fifth, sixth, etc. product (n additional products) likely to elicit? Where is the point of diminishing returns? This leads to the following TURF-based example.

Example #2

A manufacturer of air fresheners was in the process of evaluating its existing array of seven fragrances, four of which were doing quite well and three others not so well. R&D developed five new fragrances for consumer testing. Based on practical production, marketing and distribution considerations, a lower limit of six fragrances and an upper limit of eight fragrances had been set for the line.

Further, since four of the seven fragrances were effective market performers, there was no intent to eliminate them from the product line. They did, however, need to be included in the study for a comprehensive TURF analysis.



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The questions that needed answering were:

- What is the appeal of each new R&D fragrance relative to the four good market performers and the three weaker ones?
- Of the 12 fragrances, and building incrementally on the four successful fragrances, which two to four of the remaining eight fragrances would be most likely to yield the optimal line configuration?

TABLE II	
<u>PERCENTAGE CHOOSING FRAGRANCES</u>	
BASE:	DEFINITELY/ PROBABLY <u>WOULD BUY</u>
EXISTING FRAGRANCES	(500) %
<u>Better Market Performers</u>	
A	42
B	40
C	39
D	36
<u>Weaker Market Performers</u>	
E	21
F	18
G	11
<u>R & D CANDIDATES</u>	
V	38
W	35
X	17
Y	15
Z	10

Table II summarizes the purchase interest scores for the various fragrances. It is clear that, as a group, the current "better marketing performers" elicited relatively high choice levels. TURF results, shown in Table III, determined that these four fragrances were chosen by an aggregate of 73%, clearly justifying and supporting their retention as a fragrance grouping.

While two R&D candidates (Fragrances V and W) each individually outpaced their counterparts and the "weaker performers"—being chosen by 38% and 35%, respectively (See Table II)—TURF analysis disclosed that new candidate V offered the greatest incremental potential (+8%). New candidate V increases the potential "reach" by five flavors to 81% from the 73% noted for the existing fragrances A-D.

New candidate W, while eliciting high choice scores on a par with new candidate V (35%, 38% respectively), was found not to significantly enhance the breadth of the fra-

grance line appeal. In fact, new candidate X, although chosen by only 17%, drove the net gain up an additional seven percentage points to a cumulative 88%. This type of finding, although infrequent, clearly suggests a strong niche appeal for this air freshener fragrance.

TABLE III

MAJOR TURF CHOICES

(Partial Data)

<u>EXISTING FRAGRANCES</u>	<u>Incremental Potential</u>	<u>Cumulative Choices</u>
Better Market Performers (A - D)	73%	73%
<u>Plus (Cumulative Appeal)</u>		
New Candidate V	8%	81%
New Candidate X	7%	88%
Weaker Existing Fragrance E	2%	90%
New Candidate W	1%	91%

TURF indicates that retaining weaker existing fragrance E and/or introducing new candidate W would not materially enhance interest in the overall line. Their inclusion, based on their small potential contribution, could not be justified on a cost/return basis.

The conclusion to be drawn from this TURF analysis is that with a line of six products (the four existing better market performers, A-D, and two of the five new candidates, V and X) the brand includes a line of fragrances with the potential of substantial interest to 88% of the air freshener consumers.

It should be pointed out that these data are based on total category users. Depending on a brand's position in the marketplace and specific competitive considerations, additional supplementary TURF analyses may also be warranted to examine line configurations among select user subgroups, e.g., heavier vs. lighter category users and/or different brand user subgroups, in addition to total sample analysis.

Conclusion

TURF analysis is a versatile technique that should be considered:

- To plan optimization of product lines.
- To provide guidance for possible line extensions.

It offers reliable, cost effective guidance to research and marketing decisions. TURF analysis studies may be conducted as stand-alone projects or integrated into more comprehensive concept/product studies. □

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Observations of a research curmudgeon

by Thomas T. Semon

Editor's note: Thomas T. Semon is a research consultant in marketing based in Fort Lee, New Jersey.

Motherhood issues

If a quality or feature is rated the same for all brands, its importance in brand choice is nil, no matter how important people say it is. Features or qualities everyone deems "very important" are sometimes called "motherhood issues." They can influence the choice between classes of solutions, like oil heat versus gas heat, adding staff versus new equipment, fish versus meat for dinner. This might be called the generic decision stage, which is often subliminal. Once that stage is complete, motherhood issues play no role in the brand decision, since non-qualifiers have already been eliminated. Many surveys waste a good deal of time and effort reconfirming that motherhood issues are indeed motherhood issues.

Threats

Research will usually prove that somebody was wrong. Therefore it's a threat to someone—possibly you.

Objectivity

Researchers pride themselves on their objectivity; an impartial observer might wonder. Consider what happens when a survey result turns out to be so different from expectations that we're sure the client would question it. We may go to great lengths to recheck, even re-interview, and review procedures and codes. Do we expend the same efforts on results that come in as expected? Couldn't they be just as wrong?

To reduce that threat insist on using the newest, most advanced methods in the next survey. It makes you look progressive and up to date; it also prevents embarrassing historical comparisons, since the new survey data will not be comparable to previous ones.

Arrested development

New technologies tend to ape traditional formats until they become well enough established to create their own: early automobiles looked like buggies for years. Telephone interviewing is well established, but questionnaires still ape the format of personal and mail questionnaires, often quite inappropriately. It is high time for telephone researchers to develop questioning formats that take into account the strengths and weaknesses of the non-visual, aural communication medium. There are some technology innovations, but the basic questioning approach remains mired in routine, ignoring limitations like respondent attention and memory, which

are more serious in this context.

Research and measurement

Much of what we call marketing research is not research at all, but measurement. Our cultural bias favors measurement because it provides numbers, symbols we associate with scientific, rational, orderly processes; the numbers tell us how much, how often, how many. Research, on the other hand, tells us how and why, soft information that can't be used in equations and is despised by bean counters.

But our measurements often measure things that are only crude approximations of what we really want to measure, things that sound reasonable and that we actually can measure easily. Audience ratings are an example. A perverse effect of commercially successful measurement is a gradual shift in the target of the optimization effort, from the actual desired effect to the measure that supposedly reflects it. At a large ad agency where I once worked, print ads were carefully crafted to achieve high Starch ratings, rather than to help sell the product.

We can improve the utility of measurement by improving the validity of what we actually measure. That's what research is for, and we don't do enough of it.

How to buy research

Competitive bidding on standardized specifications may be all right for some routine measurement jobs, but not for research. Before you award a research contract to a low bidder you must determine what you are not going to get—and be sure you don't need it.

That may not be as easy as it sounds. The best way to do it is define what you really want to know, regardless of feasibility. From that point, you can define what you expect to learn from the best possible survey, and what is practical in terms of time, money and inherent feasibility. Establishing these benchmarks will almost certainly entail a re-examination of the presumed information need; you might realize that even the best possible survey may not provide information that is sufficiently reliable; the survey approach has limitations that are not always recognized.

Most likely, though, clarifying these issues will show the importance of getting the researcher involved from the beginning of the planning stage, before any budget is set or specs are written. Management's failure to do so lies at the root of much of our

wasteful survey work.

Job insurance

Most middle managers are well aware of a special research benefit: A bad decision supported by a study is far less threatening to job security than the same decision without a research backing—and the employer pays for the insurance.

Plus ça change

"Survey research often falls short of the careful design and methodical execution implied by the word 'research'; too many surveys are merely crude measurements of variables believed but not proved to be relevant to a given problem. The status of survey research is reflected in management's reluctance to spend on it sums anywhere near those spent on product development."

That quote is from an article in *Mediascope*, April 1965. I wouldn't change a word of it today.

Significance

Researchers love to quote statistical significance and confidence limits. I am 90% confident that these are misunderstood or misinterpreted 90% of the time. If these are shown anywhere other than in a footnote or an appendix, I suspect a snow job unless the limitations of the survey results are prominently spelled out on the same page.

In most cases, biases caused by question wording, memory lapses and nonresponse are far more serious sources of error than random sampling probability; but we have no measure for them, leaving the random-sampling error statement as the only numerical indicator. If we cannot assign a numerical value to something, we tend to assume it is zero. This may be stupid but we can't help it—

we've been trained to react to numerical statements.

A subtler problem with these statistical statements is they invariably assume a test against a null hypothesis, even if the hypothesis makes no sense whatever from a business perspective. "Top-of-mind awareness of our brand name has risen from 11% before the start of the campaign to 14.5% after the second month, an increase significant at the 95% confidence level." Bully! But what was the target? Of all the before-and-after studies I have seen in the past couple of decades, only a handful used samples large enough to provide the statistical power needed to assess whether the management target had been met. To understand statistical power, you may have to consult a textbook. But it's real and may be more important than the routine confidence limits.

Choose your proverb

Information users—whether the information is based on research surveys or another source—should have a two-sided sign on their desks. One side reads: "A little learning is a dangerous thing"; the other says: "Half a loaf is better than none." I tend to favor the latter; the danger in the former can be minimized with a bit of informed skepticism, a healthy attitude for researchers and research users.

Inertia

A trap for the unwary brand manager is to mistake inertia for brand loyalty. Inertia among your brand users is your area of potential vulnerability, the sleeping dog your competitors will not let lie. Customer satisfaction surveys must distinguish active, explicit brand loyalty from passive, accepting inertia. It's not easy. □

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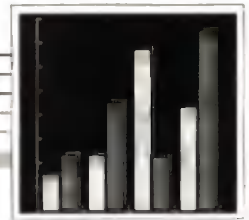


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Americans' definition of family is changing

Most Americans agree that a single parent raising a child constitutes a family. An unwed heterosexual couple with a child also qualifies. But remove children from the arrangement and the definition narrows: Childless couples—heterosexual or homosexual—do not fit Americans' definition of a family unit.

These were among the findings of a new nationwide study conducted by the Barna Research Group Ltd. of Glendale, Calif. The questions were asked of a random sample of 1,009 adults, with a margin of error of plus or minus 4% at the 95% confidence level.

ferent age groups. Baby Boomers and Busters—adults under 47—were more likely (42%) to consider this arrangement a family than were older adults (28%).

Opinions also varied geographically and according to marital status. Half the respondents in the Pacific region considered an unwed couple a family, compared with 29% in the South. About a third of married couples considered childless unwed couples a family, compared with 42% of never-married respondents and 43% of divorced, single adults.

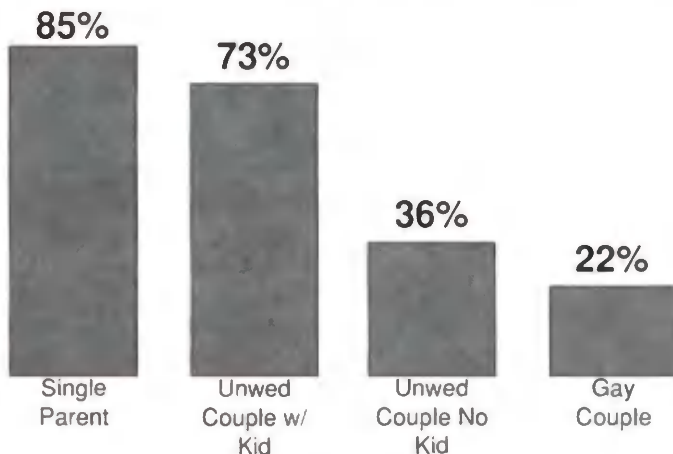
Predictably religion played a significant role on this question. The findings, however, may surprise some. Catholics were more likely (39%) to call an unwed couple a family than were Protestants (30%), with an even smaller percentage (24%) of evangelical Christians defining this arrangement a family. Regular practitioners (churchgoers and Bible readers) were also less likely to legitimize the single-parent grouping (about 30% in each group) than non-churchgoers or readers (40%).

Children seem to be a crucial factor in Americans' definition of a family. An unwed couple who have had a child together is a family, according to nearly three-quarters of the respondents. The age breakdown for this category compared to that of the single parent with child category, with younger (under 47) respondents more likely to agree than older.

Homosexual couples, defined in the survey as "two people of the same sex who are living together and have a sexual relationship with each other," received family status from only 23% of the respondents. Acceptance of gay couples

was highest among Boomers and Busters; it was slightly higher in the Northeast (25%), significantly higher in the Pacific states (40%) and higher among single adults (30% compared with 20% of married respondents). Catholics (24%) again proved more open to non-traditional arrangements than Protestants (18%), regular churchgoers and Bible readers (16% and 14%, respectively) and evangelical Christians (10%). George Barna, president of the Barna group, noted that within non-evangelical Christian denominations, these findings seem to indicate that church leaders tend to be more open to non-traditional family units than are their lay followers. He added, however, that attitudes are changing, as

Percent of Americans who consider this a family



Eighty-eight percent of respondents said they consider a single parent with child a family; 10% disagree, while 2% are unsure. By and large, this opinion cuts across racial, religious, gender, educational and geographic lines. The one visible difference was among adults aged 28 to 36, who were even more likely (96%) to view this type of household as a family. Even among older adults, however, a clear majority (82%) considered this group to be a family.

When it came to cohabiting heterosexual couples without children, however, only 36% granted this group family status; 62% said they are not a family, while 2% were undecided. Here considerable variance existed between dif-

acceptance of gay couples as families continues to grow. Barna issued a cautious prediction that a majority of adults could define a cohabiting gay couple as a family by the year 2000.

U.S. products rate high among Mexican consumers

Mexican consumers rated most U.S.-made products high for prestige and quality, according to a recent study. The poll, conducted in Mexico City, Guadalajara and Monterrey, asked 750 Mexican adults about their perceptions on quality and price for a variety of products made in the United States, Mexico, Japan and Europe. The products were major appliances, cars, casual clothing, cereal, TVs and VCRs, beer, wine and cigarettes. American goods were ranked best or nearly the best in five of the eight categories.

The poll was conducted in January 1993 by San Diego-based Market Development Inc., (MDI) which specializes in research among Hispanics in the United States and Mexico. This is the first MDI Mexico Poll.

U.S.-made major appliances fared best among the respondents, with high quality and low price. Japanese cars edged out U.S. cars in quality, but were considered more expensive than U.S. cars. Casual clothing from the United States, including jeans and athletic shoes, were highly rated on both counts, as were cereals; Mexican items in these categories also enjoyed a perception of high quality, but the U.S. goods were lower priced. Mexican and U.S. cigarettes were thought to be about the same in quality, with the Mexican brands

slightly less costly. Mexican beer clearly won out among the respondents on both fronts, although U.S. brands were considered favorably. Wine was one of the few categories where European goods were strongly favored. Though somewhat expensive, it was judged the best quality. Japan led the approval ratings in both categories for TVs and VCRs, with U.S.-made units running second.

Public wants national health insurance, supports deficit program

Three-quarters of respondents in a recent survey favor a government-sponsored universal health care package. A healthy majority also support President Clinton's deficit-reduction proposals.

These and other findings were the result of a telephone survey of a random national sample of 502 adults conducted in April by Chilton Research Services, Radnor, Pa. Besides health care, the survey questioned respondents on the national deficit, automotive issues and violence in society. The results have a margin of error of plus or minus 5%.

Those who made less than \$25,000 a year were especially enthusiastic about some form of national health care, with 86% weighing in for the program. Within the general 75% majority, however, there was considerable variance on how to pay for such a program. A clear majority (70%) favored "sin taxes" on alcohol and tobacco. Three other possibilities fell far short of this option: 44% favored a 2% increase on

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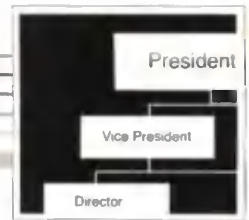
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NAMES OF NOTE



Phil Bockhorn and **Jeff Gross** have joined St. Louis-based *Maritz Marketing Research Inc.* as account managers



Bockhorn

Gross

for the firm's automotive research group in Toledo, OH.

Roger Banks has been appointed vice chairman of New York-based *Research International USA*, as well as overseer of the firm's newly formed customer research division. The firm also has appointed **Sid Simmonds** as senior vice president of new product development research in the firm's product and communications division.



Banks

Savage Jr.

J.C. Savage Jr. has been named vice president at Plymouth, MN-based *Project Research Inc.*

Randy Drawas has been promoted to vice president, marketing communi-

cations, at *MapInfo Corp.* based in Troy, NY

Bruce Giffin has been appointed vice president/research director at *Meldrum & Fewsmith Communications* of Cleveland.

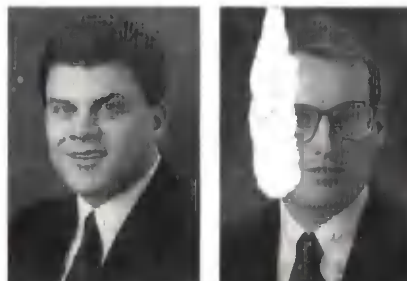


Giffin

Nozicka

Chuck Nozicka has joined Portland, OR-based *Image Analysis* as account executive.

Darren Epperson and **Robert Sloop** have joined *Market Directions Inc.* of Kansas City, MO. Epperson joins as



Epperson

Sloop

project director and Sloop joins as data processing specialist.

Day J Michaelson has been named manager of New York operations and **Walter Meneses** has been named field director at San Diego-based *Market Development Inc.* The firm specializes

in market research among Hispanics in the United States and Mexico.

Bernadette DeLamar has joined Princeton, NJ-based *Total Research Corp.* as vice president of client services.

Karen Stanley has joined Cincinnati-based *Creative Research Services Inc.* as senior vice president.

Lance Redford has been named advertising/public relations director at *Paria Group*, based in Orem, UT. **Barry**



Redford

Cunningham

Cunningham has joined the firm as research analyst and **Stephanie King** has been promoted to senior analyst.



King

Bloom

Daniel Bloom has been named senior research consultant at *Promark Research Inc.* of San Antonio, TX.

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READER SERVICE CARD  06/93

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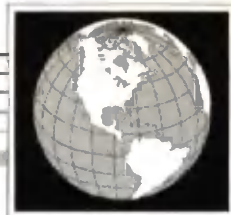
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RESEARCH COMPANY NEWS



Teenage Research Unlimited (TRU), Northbrook, Ill., has announced the formation of Kids Research Unlimited, a marketing research firm special-



Efken

izing in children. The new company is a division of TRU. Kids Research Unlimited conducts quantitative and qualitative research among 3- to 11-year-olds. Christine Efken, custom research director at TRU will direct the new firm. For more information call 708-564-3440.

IntelliQuest Inc. of Austin, Texas, has received the Texas Instruments Supplier Excellence Award. The award recognizes excellence in advertising and marketing research and commitment to the principle of total quality.

Minneapolis-based **StatPac Inc.** has relocated to 4532 France Ave. S., Minneapolis, MN 55410. Telephone is 612-925-0159.

FGI, an integrated marketing service company in Chapel Hill, NC, has merged with the research firm Market

Intelligence, Catharpin, VA. The merger was effective March 19 and is expected to increase FGI's research division by about 25%. Market Intelligence will continue to do business as a division of FGI under its present name. Mark Greene, Market Intelligence president, will continue as division president. The two companies have had a working relationship for four years.

Focus Plus Inc., of New York City, has been purchased by Elizabeth Lobrano, managing director, and her partner, John Markham.

Thomas Dupont has formed **D2 Research**, a marketing research firm.

Dupont previously was president of Oxtoby-Smith, New York. D2 Research is located at 14 Ronarm Drive, Mountain Lakes, NJ 07046. Telephone is 201-335-8189; fax is 201-334-2409.

Strategic Mapping Inc. (SMI) of Santa Clara, CA, has agreed in principle to acquire Stamford, CT-based Donnelley Marketing Information Services (DMIS) from The Dun & Bradstreet Corp. DMIS is a unit of A.C. Nielsen Co. Terms of the transaction were not disclosed, but SMI estimates that annual revenues could exceed \$40 million when the two companies' operations are fully combined in 1994. Dun & Bradstreet will retain an investment interest in SMI. SMI is a micro-

continued on p. 33

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Syndicated study examines NY Hispanic market, cable TV

Lee Slurzberg Research Inc., has announced a syndicated study of the New York Hispanic market and cable television. The Fort Lee, NJ, company has been tracking the attitudes and behavior of Hispanics for the past 20 years. The study is offered to cable television programmers and operators. Bilingual interviewers will conduct 600 personal in-home interviews with a representative sample of Hispanics in the New York ADI. The interviewing will take place in June; results will be delivered in September. For more information call 201-461-6100.

Free booklet explains demographic forecasts

Claritas/NPDC has published Update: Precision Demographics, a 37-page booklet. The booklet explains how to create annual demographic updates and forecasts for small areas throughout the United States. It explains the methodology behind the firm's development of annual estimates and five-year projections for income, wealth, age, sex and race/ethnicity data as well as population and household figures. The booklet is free. For more information call 800-284-4868.

TV ad testing system measures responses frame by frame

Consumer Outlook Inc. has introduced C-Scan, a new advertising research tool. The methodology is a computer-driven system for measuring effectiveness of TV commercials frame by frame by measuring

viewer reaction to specific elements as they appear in a commercial. The system is administered via personal interviews, eliminating the distraction of group interviews. It can be tailored to any study design, sample screening criteria and sample size. The hardware is small, easily portable and simple to set up and use, allowing studies to be fielded on the same day test commercial tapes are provided. C-Scan storyboards and graphs are usually available two days after completion of interviewing. For more information call 212-353-8380.

Four new syndicated studies from Market Directions

Market Directions is offering four syndicated research studies to subscribers: the wholesale club shopper study, the in-home entertainment study, the life insurance agent profile study and the no-till/conservation study. The wholesale shopper club study examines retail channel selection and impact of new channels on old ones; the in-home entertainment study looks at how consumers spend their leisure time and their purchasing habits; the life insurance agent profile study profiles nearly 800 life insurance agents nationwide on current problems inhibiting sales, future problems they anticipate, current agent compensation, contracts and sales trends in available life insurance policies; the no-till/conservation study provides detailed information about farmers' attitudes and opinions toward no-till/conservation tillage. For more information call Susan Spaulding at 816-842-0020.

Tracking service measures awareness of ads, related programs

Market Facts Inc. has introduced BrandVision, a continuous custom tracking

service for use in advertising research. It is designed to provide marketers with ongoing feedback on consumer awareness of and response to brands, and the marketing and advertising programs that support them. Its purpose is to aid marketers in media planning by allowing them to understand which advertising executions are working hardest for their brands in relation to money spent. For more information call 708-590-7268.

Service offers info on 60,000 software products

Synergy Computer Consulting Ltd., has expanded its services to include SoftSearch, its new software information service. The service is a comprehensive source for software information in North America with details on more than 60,000 commercial computer software products for micro-, mini- and mainframe computer environments. Requests are telephoned on a toll-free number. A customized report on the software options is generated, usually within two hours and can be delivered by mail, fax or courier. A report costs \$2.90 per program meeting the selection criteria, with a minimum charge of \$50 per search. A yearly volume discount rate of \$400 is available for up to 10 searches. SoftSearch can also provide an in-depth report on a particular software package. The report gives complete details on the program, including articles, reviews and demonstration copies of the program where available. A detailed report costs \$125 and is usually completed within two business days. SoftSearch is offering an incentive program that allows people requesting searches can receive a 10% discount on purchase of software, to a maximum of the search's cost. For more information call 800-667-6503.

Enhancements to Paper Keyboard

Datacap Inc., a developer of PC-based computer aided data entry software, has added image enhancement, forms-image removal and bar code recognition to its Paper Keyboard ICR software. The new enhancements augment Paper Keyboard ICR's current hand print, machine print (OCR) and mark sense (OMR) recognition capabilities. For more information call 914-332-7515.

NewsNet offers business database

NewsNet is now offering access to Business America Online, American Business Information's database of more than 11 million U.S. and Canadian business listings and profiles. The service presents company data compiled from more than 5,000 Yellow Pages directories, business "white-page" listings, annual reports, SEC filings and other sources. The menu-driven service can be used to conduct market primary research including business demographics. The information is available as business lists, company profiles, and total counts of particular business types based on demographics, geographical factors and other criteria including employee size and sales volume. For more information call 800-345-1301.

Cascade now offers transcriptions

Cascade Business Services now offers transcription service as part of its administrative sales and marketing support to businesses of all sizes. The Minneapolis-based firm specializes in focus group and multiple-voice transcription. All transcribed text is returned to clients via disk in either Macintosh or IBM format. For more information call Maureen Bell at 612-932-7282.

Version 2 of ESRI's ArcView now available

Environmental Systems Research Institute Inc. has introduced ArcView Version 2. The new version of ArcView software is a full-featured desktop mapping and geographic information system (GIS) program. Enhancements in power and functionality include an easy-to-program scripting language for flexibility in linking, extending and integrating ArcView's basic functions;

support for multimedia, including access to the ARC/INFO multimedia database engine, with capability to display images and drawings, and integrate a wide variety of desktop database applications; integration with other desktop technology; database connections, with capability for relational joins and virtual tables, including logical and arithmetic manipulations; View of Views, a query and display feature to interlock multiple views from multiple databases distributed on a network; Dynaset, a set of tables that can join an unlimited number of data sets into a unique table of unlimited size, and can be linked to a view. ArcView Version 2 which will be available in late summer, also is faster and requires less memory. For more information call Jim Bauman at 909-793-2853.

In addition, ESRI has announced an interface between the ARC/INFO geographic information system software and the Oracle Highways integrated management information system. The new interface allows transportation professionals to display attribute data about transportation infrastructure, including such factors as pavement condition, bridge maintenance schedules, accidents. For more information call 800-866-6510, ext. 767.

Equifax introduces geographic information system

Equifax National Decision Systems has introduced Infomark-GIS, a fully integrated

geographic information system. The system provides sophisticated analysis and mapping capabilities, including expanded internal data integration, high-definition and 3-D mapping, and automated problem solving, which enable marketers to easily integrate their internal data with information from more than 60 national marketing databases. The system also provides optional automated applications that are customized to solve specific marketing problems common within the retail, restaurant and financial services industries. For more information call 800-866-6510, ext. 767.

SPC software for Windows

SPSS Inc. has introduced QI Analyst SPC Windows, a new statistical process control software package for quality improvement in manufacturing, health care, government and other industries. It is one of the first SPC packages running under Microsoft Windows, and provides a set of 23 SPC charts, capability statistics, Shewhart control tests and reports. It lists for \$695, with shipping scheduled for late July. A special introductory price of \$395 is available until Sept. 30, including a bonus of a free gage R&R program. For more information call 800-543-9262.

1993, 1998 demographic projections from CACI

CACI Marketing Systems has released its 1993 and 1998 demographic projections. The updated demographic data in-

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Detroit Edison

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automated system.

To be truly effective, VRU systems must meet the needs of utility customers. Actually implementing these VRUs involved additional customer input from focus groups and one-on-one human factors testing.

"The focus groups were instrumental in the customer testing and reviewing the system. The groups also showed us ways to improve it," says Robert Sitkauskas, director of communications technology for Detroit Edison's VRU system.

Market researcher Newbold adds, "The focus groups allowed us to immediately fix [general problems]."

Scripts tested

These focus groups met several research objectives. Before the system launch, Detroit Edison used focus groups to test the scripts that the customers would hear when they called into the system. Considering all the sophisticated hardware and software that accompanies an enormous interactive voice unit, the script would appear to be the easiest part. Actually, this was one of the most difficult obstacles Detroit Edison

faced.

First, the script had to be user friendly for both rotary and touch-tone telephone users. It had to be short enough to be easily understood while providing enough information for customers to navigate easily through it. The script had to accommodate several different types of calls: outage reports, callbacks for outages and reporting other electrical equipment problems such as downed wires or low voltage. In addition, the script had to tell callers what to do if they wanted to talk to an actual customer representative to handle other matters like billing and service inquiries.

This script had to be readily understandable to various customer groups, from high-tech callers familiar with other voice response systems to those who might be new to the technology. Vocabulary and diction had to be clearly understood by customers of all ages.

Soliciting customer feedback broke through some old stereotypes. Detroit Edison's focus groups showed that some senior citizens may be more technologically savvy than expected. The process also reinforced the idea that once customers understood the system, most liked it and actually preferred it to waiting for a cus-

tomers service representative.

"The focus groups allowed us to test different applications—the rotary and touch-tone—and test different skill levels, the technology-averse and the high-tech customers," Sitkauskas says. "We used focus groups three times with three different scenarios. We tested scripting every time."

The focus groups also had respondents individually conduct various scenarios into a system prototype. Then the group reconvened to discuss their experiences. This protocol eventually led to one-on-one human factors research with the system vendor.

The groups also led to some important changes in the system's scripts, especially for emergency calls. "We thought that it was easy to define an 'emergency,'" Sitkauskas says, but the focus groups caused the utility to rethink that idea. "We found we didn't need to keep all of the options we had thought necessary," Sitkauskas adds.

Several essential elements were identified in the script development phase. They included:

- a short introduction and concise options at each decision point;
- ensuring that rotary customers know they must *speak* their answers; and
- customer-focused wording and phrasing, such as "downed wire" rather than utility speak "wiredown."

As customers fine-tuned the scripts to eliminate jargon, Detroit Edison gained valuable "real world" information with each focus group.

"The impact was that the customers took the words out of our mouths and helped us write and read the script the way they wanted to hear it," says Sitkauskas. "We were careful to do more than one group—the nine groups let us see the whole picture. We listened to the responses and made the script changes primarily based on what the customer was telling us."

Customers also evaluated the pacing and timing of the script. Respondents evaluated a series of phrases generated by different voices and commented on when to pause throughout the script. These changes were incorporated into the final version of the script that was developed for the voice response system.

The respondents also evaluated several voices that instructed the callers. They listened to male and female voices and chose the one they thought sounded the most professional and spoke most clearly.

Promotional ideas also tested

Besides testing the script, Detroit Edison used focus groups as an opportunity to test

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Keys to successful focus groups

Focus groups can be an effective marketing research tool. But like all tools, they need to be used properly in order to provide meaningful results. The most successful focus groups include the following characteristics:

• Appropriate research objectives

Robert Bohle, president of Focus on Issues, a St. Louis-based marketing consulting and research company, says the primary purpose of focus groups is to test and develop hypotheses. "Focus groups help define various customer population segments. They help companies make better judgments," says Bohle.

William Newbold, supervisor of marketing research at Detroit Edison adds, "Focus groups are ideal for concept testing, copy testing and preliminary advertising testing." The focus group format allows the moderator to "change things on the fly and retest it. When you need a

real fast turnaround and fast input," focus groups are appropriate, Newbold says.

Bohle points out, however, that focus groups have a major limitation—they only provide directional information.

• A skilled moderator

The central figure in focus groups is the moderator, who guides and leads the discussion. This role is crucial to the overall success of the groups. However, a good moderator must walk a tightrope between asking questions and eliciting feedback from all of the respondents. "The moderator has to be able to manage without leading (the respondents) and has to be able to control strong personalities in the group," Newbold says. "A moderator is 70% of what you get from a focus group. The moderator has to make everyone feel important, so they will talk."

"You need a good moderator who knows the issues but isn't defensive—a modera-

tor can't be too close to the issues. It should be a third party," says Robert Sitkauskas, director of communications technology for Detroit Edison's VRU system. Bohle agrees. "The discussion guide and the moderator are key. The most important part is the ability of the moderator to listen and probe without passing judgment."

• Good recruiting

Another key to good focus groups is proper recruiting. Good representation is crucial for achieving meaningful results. "The recruiting should be really representative of the customer base," says Newbold. Representative and balanced focus groups were one reason Detroit Edison's VRU groups were so successful. Sitkauskas says focus groups are ideal for eliciting customer responses from a variety of demographic groups

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various promotional ideas. Unless the system is promoted effectively to the customers, callers might not understand it and might even resent its introduction.

Focus group respondents evaluated various promotional messages associated with this VRU. The respondents fine-tuned the types of messages that would have to be incorporated into any promotional activities involved in introducing a voice response system. The messages had to include a telephone number and an explanation of the advantages of an automated system over a customer representative.

After several promotional concepts were tested, a central theme emerged: The customers wanted it short and sweet. Their recommendations included:

- Glow-in-the-dark stickers with the VRU number to attach to the telephone;
- a printed message on the outside of the envelope introducing the VRU system, instead of just inserting promotional material inside the bill; and
- a "map" showing how to use the VRU system.

While not every idea was practical, these experiences further reinforced the value of the customer input Detroit Edison received when developing its VRU. Talking to the customers clearly saved both time and money. For example, using input from these focus groups, Detroit Edison de-

signed bill inserts to educate its customers about the VRU.

Next: handle billing, payment

Detroit Edison's next step is to design the system to handle routine billing and payment matters. Funneling these types of calls through an interactive system allows

customer service representatives to spend their time dealing with more complex customer service issues.

Detroit Edison wanted to identify issues associated with broadening the VRU beyond outage reports, so the utility hosted a set of focus groups to compare different billing and payment scenarios. Customers

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evaluated the scripts and concepts associated with making late payments, partial payments and extended payments on their overdue bills.

They evaluated several payment options in different formats for keying the information into the system. Scenarios were also developed to meet the needs of special types of customer groups, such as those with poor credit histories or senior citizens.

These scripts, which were more complicated than the initial VRU scripts, required respondents to key in the dates, including month and day of their next payment, and payment amounts. The respondents spent a lot of time discussing the best method for inputting this information, how much information was really required and how many days customers should have before their payments are made (30 or 60 days). Once again, customers identified the most efficient and effective methods for automating a complex task, such as bill payment, over the telephone lines. While these system enhancements are still in the wings, much of the work has identified what is and what is not practical to incorporate into the system.

Customers love the VRU

But what has been the reaction to all of these changes and proposed changes at Detroit Edison? The customers love the idea. Within just the first few months of operation, successful customer usage has exceeded expectations.

During a 1992 summer storm, Detroit Edison's VRU handled more than 175,000 calls in three days. For the first time the utility was able to handle all the incoming calls in a timely manner. Most important, the VRU system has become an effective tool in reporting outages for touch-tone and rotary customers.

And what about the customer representatives? After all, with an automated system, who needs live employees? Well, Detroit Edison still does—the utility hired 40% more customer service employees after the voice response system's introduction.

In fact, Detroit Edison's customer representatives report that their workload has actually increased, but with the right kind of calls. Rather than answering the same questions all day long and speaking to customers who are fed up waiting 10 minutes or more, the representatives now speak to more customers, faster, and actually accomplish more each day.

"Detroit Edison received more calls in

ten months in 1992 than we received in all of 1991. We are a full two months ahead in the calls. That's a big change," Sitkauskas says. More important, Detroit Edison has been able to handle this increased call volume with no drop in customer satisfaction.

More than a million calls

To date, Detroit Edison's VRU system has received and processed more than a million customer calls. Now the utility is able to process 30% more calls on an average business day. On an average Monday, the busiest day for customer calling, Detroit Edison's system logs about 19,000 calls.

The average time spent calling also has dropped substantially. Before the VRU, customers waited anywhere from 10 minutes to half an hour to report an outage. Now novice callers can report an outage in less than two and a half minutes. "Experts" who have called in previously can update their reports in as little as 90 seconds.

And most important, customers are pleased with the new systems. They were enthusiastic supporters of Detroit Edison's efforts to develop this system. Even a few minor glitches in the script-testing phase did not lessen their support.

"I thought it was very innovative," said one respondent in a recent focus group. Rotary customers were especially supportive of this new system. Another one said, "I was pleased that you could respond with a rotary phone." Another rotary telephone user added, "I liked it. It saved the time of having to wait. With other automated services, you have to wait if you have rotary telephones for an operator to come on the line."

According to a recent report, 76% of the respondents who called into this system were satisfied with the VRU. Most telling of all, the overwhelming majority of these respondents (77%) feel that the VRU system has improved Detroit Edison's customer service.

Additional refinements

But the work is never really done for a voice system like this. Detroit Edison's VRU is being further redefined to accommodate the needs of residential and small business customers. Plans are also in the works for additional system refinements. Besides automating billing and payment arrangements, Detroit Edison wants to use the VRU for outbound calling. Sitkauskas envisions that soon the VRU will be able to

call customers back to verify their power has been restored, call customers to inform them of planned outages and call for credit and collection purposes.

The focus groups also yielded another unexpected bonus—customer goodwill. "Doing focus groups helped our VRU to be positively received among customers," says Sitkauskas.

That may be the ultimate benefit of focus groups. While qualitative research cannot be definitive, it can serve as a powerful demonstration of a company's willingness to listen to its customers. When a client is ready to listen, as Detroit Edison has, everybody wins. □

Successful Groups

continued from p. 25

relatively quickly and easily.

• Well-planned discussion guide

While Detroit Edison's focus groups had a clear agenda, Detroit Edison was careful to build flexibility and fluidity into the groups. "You should have an agenda," Sitkauskas explains, "but not a rule-based agenda." Bohle adds that a discussion guide should be just that—a guide. Part of the success will depend upon the ability of the moderator and the respondents to go beyond the original guide and delve into the important underlying issues.

Indeed, the accessibility issue was never a part of the original focus groups moderator's guide. The utility thought power outages were the problem. However, the moderator uncovered inaccessibility as an underlying problem.

• Proper environment

Creating the proper environment is another key to the overall success of focus groups. To be truly effective, the research sponsors must establish the proper setting. "The setting has to provide the kind of environment where you can communicate not what you want to hear, but what you ought to hear," Bohle says.

• Interpretation

Focus groups are meaningless if the findings are not interpreted correctly. You need someone insightful to draw the conclusions from the groups, says Newbold, to make sure the findings are put in their proper context. "People can jump to conclusions based on focus groups and can be misled by one strong personality. We advocate holding multiple groups," Sitkauskas agrees, stressing that reliance on just one group can lead to skewed results. □

Product & Service Update

continued from p. 23

clude population, age, household and income information for the entire United States; breakdowns are available for any census, postal or media geography. Other breakdowns available are demographic and income forecast, a 55+ forecast, a three-area forecast, and state population projection to 2010. The updated data is provided in print or electronic media for customized areas, zipcodes, census block group, census tracts, places, cities, counties, metropolitan areas, states or the entire U.S. Demographic changes from 1990 to 1993 include: a 9 million increase in the U.S. population, for a total population of 2.57 billion; and a current annual growth rate at 0.94%, with the western United States leading the rest of the country at 2.03%. For more information call 800-292-CACI.

BASES-by-Mail allows for testing through mail panel

The BASES Group has introduced BASES-by-Mail, an alternative methodology to conduct its testing through the NFO mail panel. The service allows BASES cli-

ents up to a 30% price reduction without sacrificing accuracy or reliability of sales forecasts and analyses. Marketers testing line extensions, restaged brands or requiring low-incidence sufferers will realize the greatest benefits from the mail panel methodology. For more information call 606-655-6126.

Census-based scanner database from IRI

Chicago-based Information Resources Inc. (IRI) has introduced QScan, a census-based scanner database for consumer packaged goods manufacturers and retailers. The system is designed to evaluate product or category performance at the store level, to help target trade marketing money to high-performing stores and promotions, manage inventory levels and fulfill distribution voids. QScan (short for "quality scanning information") tracks all products in all retail stores (a "census") in chains representing more than 65% of U.S. chain ACV (all commodity volume). QScan uses data from all stores within a retail chain instead of a sample of stores, to eliminate sampling error and the need for statistical projections of data. IRI also is providing participating

retailers with in-house access to IRI's proprietary neural network software to apply quality control and value-adding routines to scanner data for each retail store. QScan also enhances InfoScan, IRI's national and local market scanner tracking service. For more information call Rob Bregenzer at 312-726-1221.

New survey and analysis system for Mac

Senecio Software Inc. has introduced MaCATI, a political polling social survey and statistical analysis system for the Macintosh. The system provides computer assisted telephone interviewing (CATI), computer assisted personal interviewing (CAPI) and disk-by-mail survey (DMS) capabilities. The software contains user interface for designing questionnaires and a statistical package compatible with industry standard mainframe packages for use on an Apple Macintosh. Features include: page-layout interface for entering and designing the questionnaire and permitting exact placement of multiple text, picture, response and sound blocks on each page; control of size, color and style of each character in any font; an interactive spelling checker, on-line dic-

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tionary and thesaurus; the ability to add pictures and make them selectable response items; and capacity to attach digitized sounds to any spot on the page. MaCATI also provides analog-rating scales, a point-and-click interface for more accurate information recording, and a mainframe-caliber statistical package that can generate fully labeled tabular results. The system operates over a local or wide area network relying on call management features to distribute and maintain the telephone sample, or as stand-alone stations worldwide. The system, which is System 7 and A/UX compatible, can use standard Apple Talk or high-speed Ethernet networks. Applications include employee and customer satisfaction surveys, social science omnibus surveys, telefund drives and alumni information update studies, voter studies and election-day exit polls. For more information call 419-352-4371.

Axum update includes 2D, 3D and contour plotting advances

TriMetrix Inc., has released Axum 3.0, the newest version of its technical graphics and data analysis package for PCs. Axum is designed for users who want to produce

publication-quality graphs and perform advanced data analysis on PCs. Axum 3.0 offers major advances in 2D, 3D and contour plotting including nonlinear curve fitting, area charts, vector plots, color-filled (flooded) contours and automatic error bars. The new version supports CGM and SCODL, making it easier for users to create publication-quality slides from their graphs. New features include mouse support, a data editor which lets users write their own functions, if and go to statements, while and for loops and nonlinear curve fitting, where Axum calculates a "best fit" curve for any user defined equation. Users can specify and graph arbitrary confidence bounds, do weighted fits, and have goodness-of-fit statistics calculated automatically. For more information call 800-548-5653.

GeoVALS gives local info about VALS 2+ segments

SRI International has developed GeoVALS for clients seeking local area information about the VALS 2+ segments. VALS is SRI's values and lifestyles program for psychographic market segmentation. GeoVALS estimates the percentage of each VALS segment in all zip codes in the

United States. GeoVALS also provides several indices of market attractiveness for market characteristics such as innovation, information seeking and brand loyalty. GeoVALS was developed with Market Statistics, a firm that specializes in local area information. Clients can purchase GeoVALS for specific states or the entire country. GeoVALS is delivered on diskette for IBM-compatible or Macintosh personal computers in ASCII format, and can be integrated into other mapping software. GeoVALS will be updated annually to reflect changes in census data and modification in the algorithms. For more information call Susan Wong at 415-859-4575.

Six reports detail geographic trends

Market Lab has released six reports detailing geographic trends. Each report combines demographic and retail data for all 3,141 U.S. counties. The Hispanic Markets and African-American Markets reports include a look at the top counties in terms of greatest proportion of total population. Age Groups by Market breaks out each market into 10 key age ranges to reveal number and percentage of population within each range. Groups range from under 5 years old to 75 and over. Retail Density examines the ratio of potential customers to number of retail outlets, with nine retail classes. Convenience Store Market is an analysis of where outlets are located, including dominant markets, ratio to other retail stores, c-store saturation, store growth and demographic ratios. Demographic and Retail Population includes county-by-county breakdown including breakdown by age, race, sex, income and retail sales/units, plus top 100 market comparisons for selected criteria. For more information, call 516-759-0300.

Version 7.0 of BMDP

BMDP Statistical Software Inc., has begun shipping Release 7.0 of its BMDP package for IBM PCs and compatibles. New features include an improved user interface, support for high-resolution graphics and data transfer capabilities. Also new is Mentor and the data import/export facility. Mentor is an interactive system with pop-up menus with information prompts, the utility automatically generates command language for several of the BMDP statistical modules. The data import/export facility can import from spreadsheets and databases and can import and exports transportable files from SAS and SPSS. For more information, call 800-238-BMDP.

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Names of Note

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Leslie Tripp has joined *ACG Research Solutions* as field supervisor. The St. Louis-based firm also has an-



Patton

Tripp

nounced the addition of **Ann Patton** as research field services director, **Esther Philip** as research analyst, and the promotion of **Karen Nanney** to quality control and database specialist.



Levin

Philip

Larry Levin has been promoted to senior vice president in the Los Angeles office of *Market Facts*. The firm has headquarters in Arlington Heights, IL.

Sharon Roberts has joined *ICR Survey Research Group* as vice president/managing director. ICR, based in Media, PA, is a division of AUS Consultants.

Andrea Saks has joined *Phil Balducci & Associates Inc.* of Tampa, FL, as vice president/research services.

Jeffrey Greenberg has been named president of the syndicated information division of Chicago-based *Information Resources Inc.*

Alan Buchalter, vice president of Van Nuys, CA-based *Interviewing Service of America*, died in March of AIDS-related complications. His family asks that any donations go to AIDS Project Los Angeles, C/O Finance Dept., 6721 Romaine St., Los Angeles, CA 90038.

Anthony Guagliardo has joined

Saurage-Thibodeaux Research Inc. of Baton Rouge, LA, as project director; he also will handle public relations. **Jude Olinger**, corporate accounts manager, has been given full responsibility of corporate account relations and research analysis.

Maria Hill and **Laura Hoage** have joined the staff of *Herron Associates Inc.* Hill joins the firm's Tampa office as facility manager. Hoage joins the firm's Indianapolis office as focus facilities supervisor.

Ann Tierney has joined *Rockwood Research*, St. Paul, MN, as a research consultant.



Tierney

Starr McNeely

Shannon Starr McNeely has been appointed director, sales and marketing at *Pine Co.*, Santa Monica, CA.

Janice Griffiths has been appointed marketing research analyst at *Pentagon Federal Credit Union*, Alexandria, VA.

Scott Waller has joined New York-based *CRC Information Systems Inc.* as vice president, sales and marketing for the firm's marketing services group.

Art Klein has joined the San Francisco office of *NFO Research Inc.* as marketing manager.

Brian Kidd has joined *Market Directions*, Kansas City, MO, as a senior analyst.

Bob Bisciglia has joined *IntelliQuest Inc.*, Austin, TX, as a consultant and analyst.

Ron Sellers has joined *Bank One*, Phoenix, AZ, as senior research analyst.

Joan Balthes Lord has joined *Alliance Research Inc.*, Crestview Hills, KY, in greater Cincinnati. Balthes, who joins as president, client services, will manage

the company's newly opened Dallas client service office.

Mark Rylander has joined *IntelliQuest Inc.*, Austin, TX, as manager, customer registration services.

Isabel Valdes, founder and president of *Hispanic Market Connections Inc.*, Los Altos, CA, has been named to the Citizens' Stamp Advisory committee by Postmaster General Marvin Runyon.

Gregg Stickeler has been promoted to manager, data collection services, at *Interviewing Service of America*, Van Nuys, CA.

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Survey Monitor

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income tax, 41% favored a gas tax hike of 10 cents per gallon, and 37% thought a 3% national sales tax was a good idea.

Respondents blamed the high cost of health care on several factors. Foremost were doctors (33%) and insurance companies (19%). Older Americans (61+) particularly held doctors responsible. Only 10% thought lawyers drove up health care costs, and just slightly more (14%) attributed high costs to politicians or the government.

On another issue, well over half the respondents (63%) supported Clinton's efforts to reduce the federal budget deficit. But a majority (52%) is still worried that the government will remain saddled with debt. Older Americans (61+) are more concerned about government spending than are adults under 30 (61% compared with 42%).

Dads give themselves a pat on the back

American fathers think they're doing a great job as parents. *Redbook* magazine surveyed 420 husbands on this and other aspects of fatherhood in January. The husbands were drawn from *Redbook's* previous "Mommy Track" national survey of 1,000 mothers 18 to 54 years old, with children under 18 living at home. EDK Associates collaborated on the study.

Nearly half the fathers thought they could raise their children as well as their wives and 42% think they are better parents than their fathers. A whopping 89% saw fatherhood as a desirable and appreciated role. However, the survey also revealed that women still take on the lion's share of parental

duties such as dressing, feeding and preparing the kids for school in the morning, and checking on a crying child at night.

The survey looked at respondents' level of engagement in childrearing as well as their self-assessment as fathers. A deciding factor seems to be how comfortable men are with working wives. The survey placed fathers in one of three categories: non-traditional fathers, who are happy to have a working wife; "mixed-role" fathers, who would prefer their wives stay home, but need the second income source; and traditional dads, where the wife doesn't work. Mixed-role fathers were both less involved with their children and less confident (36%); traditional fathers were least involved, but most comfortable with their parenting skills (36%); and non-traditional dads were most involved with their kids and fairly confident in themselves as fathers (28%).

Nearly all respondents (92%) said they would use paternity leave if it were available, but seem pessimistic that companies would encourage or support this behavior. Most thought paternity leave would jeopardize their jobs and believe that society has not caught up with their changing parental roles.

U.S. consumers ready to buy American cars

After years where foreign cars ruled the market, Americans apparently want to drive a domestic car again, according to two separate studies. More than two-thirds of Americans planning to buy a new car in the next year plan to "Buy American," according to a recently survey by Chilton Research Services of Radnor, Pa. Of the roughly 15% of Americans who say they'll buy a new car, 69% intend to choose a domestic auto, compared with 22% who say it doesn't make much difference. Only 9% plan to buy a foreign car.

Research Data Analysis (RDA), of Bloomfield Hills, MI, uncovered similar results in its national tracking study. The percentage of new car buyers (January through March) who agree with the statement "The Japanese and Germans makes much higher-quality vehicles than we make in the United States" dropped from 58% in 1992 to 55% in 1992. The recent upswing in domestic auto sales would seem to corroborate this finding. RDA's subsidiary Consumer Attitude Research surveys approximately 40,000 new car buyers every year; the survey has a margin of error of plus-minus 1%.

The Chilton study also found that the public rated American cars high on perceived quality, with 52% of the public saying that generally, domestic cars are about as good as imports. A similar proportion (51%) of car owners or leasers (88% of the population) thought they were truly equal. Those who didn't own cars were even more enthusiastic (55%) about American cars' quality. More men (62%) than women (42%) thought American and imported cars were comparable.

And 70% of the population felt that the government should raise import tariffs on foreign cars, as President Clinton has suggested. On the other hand, only 30% supported Clinton's proposed gas tax, while 55% disapprove. Respondents making less than \$25,000 a year, or without a high school diploma, were particularly unsupportive (18% and 24%, respectively).

The poll was conducted by telephone April 15-19 among a random national sample of 502 adults. The survey covered health care, the deficit and social concerns as well as automotive issues. Results have a margin of error of plus or minus 5%.



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Research Company News

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computer-based software firm which specializes in linking computerized maps with demographic and geographic data. DMIS is a supplier of demographic data for business analysis and target marketing. The unified company will offer both software and data as well as jointly developed custom applications. The DMIS data will continue to be available in a number of standard file formats for use with most databases or GIS. For more information call SMI, 408-970-9600.



Focus on Boston has opened a second focus group room at its group research center in downtown Boston. The addition increases the facility to two conference and viewing areas, two one-on-one rooms, a test kitchen and client lounges with large-screen monitors. For more information call Paul Bolden at 617-338-9636.



Claritas/NPDC of Alexandria, VA, and Troy, NY-based MapInfo Corp. have formed a partnership to develop new software products for market analysis and data visualization. The partnership is worth an estimated \$3 million to MapInfo. Under terms of the agreement, MapInfo will design and develop the mapping component of Catalyst. Claritas/NPDC's Windows-based marketing software. Catalyst will provide marketing, demographic and location data accessed from multiple sources (on-line and via CD-ROM), to permit integration of the data for market analysis and planning. MapInfo's visual component will allow display and geographic analysis of Catalyst's proprietary data and permit users to identify emerging patterns, relationship and trends that are not obvious when reviewing traditional database reports or spreadsheets. The two companies will continue to serve as value-added resellers of each others' products. For more information call 703-739-3135 or 518-274-6000 ext. 7205.



St. Louis-based **Maritz Marketing**

Research Inc. has acquired **The Research Business Group (TRBG)** of London. The acquisition was completed April 15. TRBG, Britain's largest privately owned marketing research company, becomes Maritz's sister company. TRBG posted research revenues of \$18 million for 1992, with four operating companies: The Research Business; Focus on Research; The Research Business International; and Sandpiper International.



Schulman, Ronca & Bencualas Inc. has moved to expanded offices at 145 E. 32nd St., Suite 500, New York, NY 10016. Telephone is 212-779-7700; fax is 212-779-7785.



Environmental Systems Research Institute (ESRI) of Redlands, CA, has been appointed a value-added reseller by Informix Software Inc. of Menlo Park, CA. Informix is a relational database management system developer. ESRI now provides the entire Informix product line. ESRI also has announced its intent to port its desktop geographic information system (GIS) software products to the Windows NT operating system. ESRI will announce and ship products for the NT environment after the general release of Windows NT.



Synectics Inc. has moved to 20 University Road, Cambridge, MA 02138. Telephone is 617-868-6530; fax is 617-354-2923.



Kirk Tyson International has moved its Chicago-area offices to 4343 Commerce Court, Suite 615, Lisle, IL 60532-3619. Telephone will remain the same at 708-969-0100.



Suburban Associates Marketing Research, Ridgewood, NJ, has announced the redecorating and updating of their Woodbridge, NJ, focus group facility. For more information call 908-855-8900.

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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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St. Paul, MN 55113
Ph. 612-631-1977
Contact: Scott Murphy
Full Svce Qual/Quant., Consumer,
Bus-To-Bus, High-Tech, Ag.

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Canton, OH 44718
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Contact: Alice Rodgers
Creative/Cost Effective: New
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Pamela Rogers Research
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Boulder, CO 80302
Ph. 303-494-1737
Contact: Pamela Rogers
Environmental Issues-Healthy
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Minneapolis, MN 55405
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Contact: Jane Stegner
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QRCA/AMA/Adv. Club.

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Bronxville, NY 10708
Ph. 914-337-1364
Contact: Gina Thorne
Ideation, teens, New Product
Ad Concepts, Package Goods.

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Contact: Jerry Travis
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Ph. 619-674-1031
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Life in Russia

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ers, is the slump in economic output. Many suggestions were made to improve productivity. The most frequently

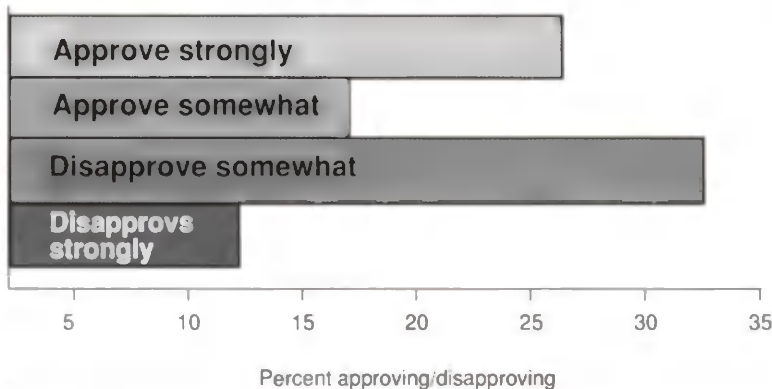
centralized system to manage the economy, where there were few incentives to increase productivity. (A popular joke went, "The government pretends to pay us, and we pretend to work.") With that kind of history, man-

jority saw themselves as inferior to Western businessmen. However, taking a longer view, few disagreed that Russia possessed the human, technological and natural resources to eventually get the job done.

So from all of this can we look into the crystal ball and picture Russia five or 10 years from now? What seems to be the case is that there is a broad support for the "rightness" of the reform programs, and an underlying will of the people to endure the hardships until measurable results begin to be realized. What is lacking, however, is confidence in the government to lead society out of its current crisis, a situation that is unlikely to change until the remaining old guard cease their fight to return to the old system, and let a new government move forward with social and economic reforms.

In the end, however, it's the people's action that is the key to the program's success. Little businesses springing up on every street corner are positive signs of classical capitalism at work, and proof that when the going gets tough, the tough get going. Russia no doubt will make it down the road to prosperity—it's just that for many, at this point the road is full of rocks and potholes. □

Efforts to establish a free market economy



mentioned was encouraging the development of new businesses, cutting taxes and attracting Western capital.

Does the country currently have the management firepower to get the job done? Many think not. This is a country that not long ago relied solely on the

agers feel ill-prepared for the new vision. These business people rated themselves on the low end of the scale for resourcefulness, necessary skills and taking responsibility. Topping the list of negative qualities was thinking short-term rather than long-term, and a ma-

1993 SYNDICATED/OMNIBUS DIRECTORY

Section One Alphabetical Listing

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

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Clark, NJ 07066
Ph. 908-388-5955
Fax 908-388-5645

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ARC Yellow Pages Ad Size Study (S)
ARC Measurement Study of Yellow Pages (S)
ARC/TAG Voice Information Services Study (S)
COMPARE/Comparison of Modia Product Purchase and Reach Evaluation (S)
SIMS/Syndicated Usage Measurement Svcs. (S)

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

Behavior Research Center, Inc.
1117 N. Third St./P.O. Box 13178
Phoenix, AZ 85002-3178
Ph. 602-258-4554
Fax 602-252-2729
Contact: Earl De Berg, Rsch. Dir.
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U.S. Symbol Study (O)
Consumer Track (O)
Metro Track (O)
Hispanic Track (S/O)
Business Track (S)

Beta Research Corporation
6400 Jericho Turnpike
Syosset, NY 11791
Ph. 516-935-3800
Fax 516-935-4092
Contact: Dick Welch
BOE - Beta Omnibus Exchange - Adults (O)
BOE - Beta Omnibus Exchange - P/M's (O)
BOE - Beta Omnibus Exchange - Healthcare (O)
SPACE - Syndicated Pharmaceutical Advertising Communicative Evaluator (S)

Irwin Broh & Associates, Inc.
1011 E. Touhy Avenue
Des Plaines, IL 60018
Ph. 708-297-7515
Fax 708-297-7847
Contact: David Waitz
Electric Appliances (S)
Hardware (S)
Home Healthcare (S)
Lawn & Patio (S)
Marine Products (S)
Outdoor Power Equipment (S)
Sporting Goods (S)
Travel Industry (S)

Bruskin/Goldring Research, Inc.
100 Metroplex Drive
Edison, NJ 08817
Ph. 908-572-7300
Fax 908-572-7980
Contact: Dick Hare

Omnitel - Weekly national consumer study. For times when you need answers to a few marketing questions. It furnishes the same data quality as well-run dedicated surveys. (O)
Integrated Survey Information System-ISIS - Weekly national consumer study. For custom surveys up to 15 minutes in length. It also furnishes the same data quality as well-run dedicated surveys. (O)
(See advertisement on page 2)

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

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

Chemark Consulting
9916 Carver Rd./Ste. 103
Cincinnati, OH 45242
Ph. 513-891-9502
Fax 513-891-2196
Contact: Roger Lohman
Chemical Industry Studies (S)

Children's Market Research, Inc.
1385 York Ave.
New York, NY 10021
Ph. 212-794-0983
Fax 212-879-8495
Contact: Dr. Selina S. Gruber
Youth Omnibus™ (O)
Kid Trends Reports (S)
Snacks & Prepared Foods Reports (S)

Claritas/NPDC, Inc.
201 N. Union Street
Alexandria, VA 22314
Ph. 703-683-8300
Fax 703-683-8309
Contact: Howard Lax
The Market Audit (S)

Com-Sci Systems, Inc.
444 Frontage Road
Northfield, IL 60093
Ph. 708-446-0446
Fax 708-446-0504
Contact: Richard J. Schlesinger
BPI - Brand Penetration Index (S)
On-Premise Liquor & Beverage -BPI (S)
Price Tracking Study (S)

Creative Research International, Inc.
100 Sheppard Ave. E.
Toronto, ONT, M2N 6N5
Ph. 416-250-8500
Fax 416-250-8515
Contact: Elisabeth Jaye
Yankelovich Monitor™ In Canada (S)
Youth Target (S)
Green Action Trend (S)

Custom Research, Inc.
P.O. Box 26695
Minneapolis, MN 55426
Ph. 612-542-0800
Fax 612-542-0864
Contact: Jodie Palmquist
Criterion® Omnibus (O)

Danis Research International
383 Route 46 West
Fairfield, NJ 07004-2402
Ph. 201-575-3509
Fax 201-575-5366
Contact: Carl S. Raphael
Fresh Track™ (S)

Dittman Research Corporation of Alaska
8115 Jewel Lake Road
Anchorage, AK 99502
Ph. 907-243-3345
Fax 907-243-7172
Contact: Terry O'Leary
Multi-Quest® (O)
The Alaska Poll® (S)

Doane Marketing Research, Inc.
1807 Park 270 Drvne, Ste. 300
St. Louis, MO 63146
Ph. 314-878-7707
Fax 314-878-7616
Contact: David M. Tugend, V.P. Client Svcs.

Pesticide Profile - Hard copy and database identifying the crop protection products used for traditional agricultural crops as well as specialty crops. Done annually. (S)

Animal Health Market Study - Quarterly study identifies market share of beef, dairy & swine anthelmintics, feed medications/additives, implants and pharmaceuticals used on U.S. livestock farms. (S)

Corn Seed Market Study - Annual study identifies specific hybrid brand shares of corn seed planted on U.S. farms. (S)

Ehrhart-Babic Ascts.
120 Route 9W
Englewood Cliffs, NJ 07632
Ph. 201-461-6700
Fax 201-461-9435
Contact: Tracy Bacon
National Alcoholic Beverage Index (S)
National Retail Tracking Index (S)

Erdos & Morgan/MPG
116 East 27th St., 7th Flr.
New York, NY 10016
Ph. 212-685-9393
Fax 212-685-9629
Contact: Pat Botwinick
Frequent Business Travelers (S)
Frequent Leisure Travelers (S)
Opinion Leaders (S)
Purchase Influence in American Business (S)
Professional Investment Comm.-Worldwide (S)
U.S. Professional Investment Community (S)

Gallup Canada, Inc.
180 Bloor St. W., 10th Floor
Toronto, ONT, M5S 2V6
Ph. 416-961-2811
Fax 416-961-3662
Contact: Gerald Germany
National Telephone Omnibus (O)

Codes:

S=Syndicated
O=Omnibus

1993 SYNDICATED/OMNIBUS DIRECTORY

Gallup & Robinson, Inc.
575 Ewing Street
Princeton, NJ 08540
Ph. 609-924-3400
Fax 609-924-3400
Contact: Jane Sherry
Advertising Impact Research Services (S)

Gikas International Co.
11611 Old Georgetown Rd., Ste. 201
Rockville, MD 20852
Ph. 301-468-2380
Fax 3301-770-0171
Contact: George Gikas
ConsumerLab (S)

Graham Research Service, Inc.
P.O. Box 966
Pelham, NY 10803-8966
Ph. 212-966-8301
Fax 212-297-0025
Contact: Robert Schultz
GRIPS (O)
GRIPS (S)

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

HealthFocus, Inc.
216 Fourth Street
Emmaus, PA 18049
Ph. 215-907-2233
Fax 215-967-6778
Contact: Linda Gilbert
HealthFocus On U.S. Consumers (O)

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

ICR Survey Research Group

605 West State Street
Media, PA 19063
Ph. 215-565-9280
Fax 215-565-2369
Contact: Fred Soulas

EXCEL - A consumer omnibus using RDD sampling and CATI interviewing. One week turnaround for each of two samples of 1000 interviews each week. (O)
Tcen EXCEL - Same procedure as regular EXCEL except the weekly sample size is 125 of which half are male teens and half are female teens. (O)
(See advertisement on page 21, 23, 25)

IMR Research
140 Burlington
Clarendon Hills, IL 60514
Ph. 708-654-1077
Fax 708-654-0147
Contact: Kaye Wilson
Continuing Consumer Survey-U.S. (S)
Continuing Consumer Survey-Canadian (S)
Continuing Consumer Auto Maintenance Survey (S)
Continuing Auto Dealer Maintenance/Parts Survey (S)

Information Resources, Inc.
150 N. Clinton Street
Chicago, IL 60661
Ph. 312-726-1221
Contact: Robert J. Breggenzer
InfoScan™ (S)

IntelliQuest, Inc.
1250 Capitol of Texas Hwy. S.
Bldg. 2, Plaza One
Austin, TX 78746
Ph. 512-329-2424

Fax 512-329-2434
Contact: Kevin Stepan
Desktop Computer Tracking Study (S)
Portable Computer Tracking Study (S)
Computer Printer Tracking Study (S)
Desktop Computer Tracking Study (S)
Color Printer Tracking Study (S)
Work Station Tracking Study (S)
Networking Tracking Study (S)
Home Computing Tracking Study (S)
InvesTrack IQ (S)
(all studies offer an omnibus option)

International Demographics, Inc.
3355 W. Alabama, Ste. 506
Houston, TX 77098
Ph. 713-626-0333
Fax 713-626-0418
Contact: Bob Jordan
The Media Audit (S)

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

Gene Kroupa & Associates
222 N. Midvale Blvd., Ste. 29
Madison, WI 53705
Ph. 608-231-2250
Fax 608-231-6952
Contact: Dr. Gene Kroupa, Rsoh. Dir.
Dane Trak (O)
Badger Track (O)

MRCA Information Sources
4 Landmark Square
Stamford, CT 06902
Ph. 203-324-9000
Fax 203-348-2087
Contact: Ken Murphy
National Consumer Purchase Panel (S)
MenuCensus. Casual Apparel Usage, OTC/Use (S)
Communication Awareness (S)

MackKay & Company
One Imperial Place, #306
Lombard, IL 60148
Ph. 708-916-6110
Fax 708-916-4661
Agricultural Equipment Parts Market (S)
U.S. & Canadian Heavy Truck Parts Market (S)

Maritz Marketing Research/D.H. Macey Division

143 E. Main Street
Lake Zurich, IL 60047
Ph. 708-438-4941
Fax 708-438-5896
Contact: D.H. Macey, V.P.

Hispanic Market Measurement Services - Hispanic & Non-Hispanic population sales, share, promotions, pricing, and buying behavior. Measured for brands/categories, includes shopping behavior in all retail outlets. Measures targeted Hispanic business performance & total market performance. (S)

Hispanic Facts - Collects mail questionnaires, data on Hispanic and Non-Hispanic samples. Telephone contact with mail panel samples also available. (O)

Maritz Marketing Research, Inc.

1297 North Highway Drive
Fenton, MO 63099
Ph. 314-827-1610
Contact: Roy Cleveland, V.P.

Farmers' Pesticide Use Study - Annual syndicated study among 30,000 growers which provides brand share and tracking of farm pesticide usage in the U.S. and Canada. (S)

Farmers' Pesticide Satisfaction Study - Annual syndicated study with growers providing information on growers' satisfaction with pesticide products. (S)

Golf Course Pesticide Use Study - Study with 1,500

golf course superintendents determines pesticide use practices and brand share in the U.S. (S)
Pesticide Use Study On Specialty Crops - Study provides brand and dollar expenditures for pesticides on 19 vegetable and 18 fruit, nut and vine crops. (S)
(See advertisement on the back cover)

Maritz Marketing Research, Inc.

3035 Moffat Dnve
Toledo, OH 43615
Ph. 419-841-2831
Fax 419-841-8349
Contact: Tim Rogers, V.P.

Initial Buyer Study - Syndicated study among early buyers of recently introduced automotive vehicles. (S)

Early Model New Car and Truck Buyer Study - Primary research study of 24,000 new car buyers and 6,000 new truck buyers regarding product satisfaction, purchase considerations, shopping patterns, dealer satisfaction, trading dynamics, and demographics. Report released in March. (S)

Second Quarter New Car and Truck Buyers Study - Primary research among 36,000 new car buyers and 9,000 new truck buyers regarding product satisfaction, purchase consideration, shopping patterns, alternative fuels, trading dynamics, and household demographics. Report released in August. (S)

Canadian New Car and Truck Buyer Study - Primary research among 21,000 new car buyers and 7,560 new truck buyers regarding product satisfaction, purchase considerations, dealer satisfaction, trading dynamics, and household demographics. Report released in September. (S)
(See advertisement on the back cover)

Market Development, Inc.

1643 6th Avenue
San Diego, CA 92101
Ph. 619-232-5628
Fax 619-232-0373
Contact: Dave Taber
MDI Hispanic Omnibus (O)
MDI Hispanic TEEN Omnibus (O)
MDI Mexico Omnibus (O)

Market Directions

P.O. Box 13407
Kansas City, MO 64199
Ph. 816-842-0020
Fax 816-472-5177
Wholesale Club Shopper (S)
In-Home Entertainment (S)
Life Insurance Agent Study (S)
No Till/Conservation Tillage Study (S)

Market Facts, Inc.

3040 West Salt Creek Ln.
Arlington Heights, IL 60005
Ph. 708-590-7238
Fax 708-590-7114
Contact: Tom Mularz
TeleNation (O)

Market Facts of Canada

77 Bloor St. West
Toronto, ONT, M5S 3A4
Ph. 416-964-6262
Fax 416-964-5882
Contact: Peter Greensmith
National Flexibus (O)
TeleNation-Canada (O)
Canadian Eating Habits Study (S)
Beverage Consumption Study (S)
Household Equipment Survey (S)
Household Flow of Funds Survey (S)
Customer Service Index (S)

Market Segment Research, Inc.

1320 S. Dixie Hwy., Ste. 120
Coral Gables, FL 33146
Ph. 305-669-3900

Codes:

S=Syndicated
O=Omnibus

1993 SYNDICATED/OMNIBUS DIRECTORY

Fax 305 669-3901
 Contact: Gary Berman
 MSR Omnibus Study (O)
 MSR Minority Report (S)

Market Trends
 3633 136th Place SE, Ste. 110
 Bellevue, WA 98006-1451
 Ph. 206-562-4900
 Fax 206-562-4843
 Contact: Leslie Huberty
 Seattle/Tacoma SMSA Opinion Monitor (O)
 Washington State Opinion Monitor (O)
 Portland, OR/Vancouver, WA SMSA Opinion Monitor (O)
 Oregon State Opinion Monitor (O)

Marketing Evaluations/TVQ
 14 Vanderventer Ave.
 Port Washington, NY 11050
 Ph. 516-944-8833
 Fax 516-944-3271
 Contact: Steven Levitt
 TVQ Program Ratings (S)
 Performer Q (S)
 Cartoon Q (S)
 Sports Q (S)
 Prnduct Q (S)

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

Metromark Market Research, Inc.
 3030 Devine Street
 Columbia, SC 29205
 Ph. 803-256-8694
 Fax 803-254-3798
 Contact: Emerson Smith
 Metromark Executive Panel (O)
 Metromark Residential Panel (S)

Monroe Mendelsohn Research
 841 Broadway
 New York, NY 10003
 Ph. 212-677-8100
 Fax 212-677-6833
 Contact: Tony Motta, Vice Pres.
 Mendelsohn Affluent Omnibus (O)
 Mendelsohn Affluent Survey (S)
 Affluent Recontact Survey (S)

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

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

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

The NPD Group
 900 W. Shore Rd
 Port Washington, NY 11050
 Ph. 516-625-2220
 Fax 516-625-2222
 Contact: Claire Hamilton
 Insta-Vue (O)
 Medical Influence Studies (S)

NuStats
 001 W. Martin Luther King
 Austin, TX 78701
 Ph. 512-469-6400
 Fax 512-469-6408
 Contact: Ed Cantu
 Hispanic InfoSource (S)

OmniTrack Group, Inc.
 220 S. King Street, Ste. 975
 Honolulu, HI 96813
 Ph. 808-528-4050
 Fax 808-531-0176
 Contact Barbara Ankersmit
 QuikTrack (S)
 Consumer Health Trends Study (S)
 Visitor Media Usage Studies (S)
 Bank Trak (S)
 Asian-American Study (S)

OPINION RESEARCH CORPORATION

Opinion Research Corporation provides a range of omnibus and shared-cost studies, designed to cost-effectively address your most important publics. All studies are conducted in both the U.S. and Europe.

CARAVAN[®]

- A weekly consumer telephone omnibus survey
- Provides a nationally representative projectable sample of 1,000 U.S. adults
- Results provided in three business days
- An ideal vehicle for:
 - image measurement
 - advertising tracking
 - product awareness
 - concept testing

Executive CARAVAN[®]

- Quarterly telephone omnibus survey of top and middle-level business executives
- Conducted among the 1500 largest industrial and service-sector companies
- Respondents represent influential business decision-makers and "upscale" consumers

Corporate Reputations and Business Issues Today

- A family of related shared-cost surveys that focus on the image of, and key business issues facing participating companies and selected competitors
- Publics surveyed are: the General Public, Business Executives, Media Professionals and the Financial Community

***For additional information contact:
 Judi Lescher at 1-800-999-0213***

1993 SYNDICATED/OMNIBUS DIRECTORY

Opinion Research Corporation

P.O. Box 183
Princeton, NJ 08542
Ph. 800-999-0213
Fax 800-759-5785
Contact: Judi Lescher

Caravan - National telephone omnibus survey of 1,000 adults conducted weekly, Thursday through Sunday. Preliminary results available on Monday. Full tabulations delivered on Tuesday. CATI interviewing utilizing state-of-the-art RDD sample. In-house professional interviewers and data processing staff. (O)

Executive Caravan - Three studies: One in the U.S., one in the European Economic Community, one in the United Kingdom. Bi-monthly telephone survey of senior and mid-level managers. (O)

Corporate Reputations Today - Three coordinated annual studies—each conducted in the U.S. and in the European Economic Community: (1) General Public Corporate Image; (2) Executive Corporate Image; (3) Business Relations with the media. Focus of these studies is on perceptions of participating companies and benchmarked companies, their competitors, their industries and business in general. (O)

European Household Caravan - Telephone omnibus survey of 1,000 households monthly. (O)

United Kingdom Household Caravan - Telephone omnibus survey of 1,000 households weekly. (O)
(See advertisement on page 41)

Perception Research Services

One Executive Drive
Ft. Lee, NJ 07024
Ph. 201-346-1600
Fax 201-346-1616
Contact: Elliot Young
PRS-FSI Audit (S)

J.D. Power And Associates

30401 Agoura Road
Agoura Hills, CA 91301
Ph. 818-689-6330
Fax 818-889-3719
Contact: Patty Patano
Automobile Owner Satisfaction Program (S)
Computer End-User Satisfaction Study (S)
Dealer Satisfaction Programs (S)

Restaurant Research Associates

6 Hutton Center Dr., Ste. 1245
Santa Ana, CA 92707
Ph. 714-241-7930
Fax 714-241-7933
Contact: Ron Clark
Lcs Angeles/Orange Co. Family Restaurant Tracking (S)
San Francisco Family Restaurant Tracking (S)

Rockwood Research Corp.

1751 West County Road B
St. Paul, MN 55113
Ph. 612-631-1977
Fax 612-631-8198
Contact: Jodie Wehrspann

Ag-Tel Crop and Livestock Study - Ag-Tel is conducted ten times a year. Using Farm Journal Data Base, Rockwood Research surveys crop and livestock producers throughout the U.S. Participants pay a \$375 initialization fee, \$375 for each question asked of the total sample, and \$325 for each question asked of less than 100% of the base number of respondents. The farm segments surveyed are cow/calf operators, hog producers, wheat growers, dairy farmers, farmer cattle feeders, corn growers, peanut farmers, cotton growers, and soybean growers. (O)
(See advertisement on page 17)

The Roper Organization

205 East 42nd Street
Mamaroneck, NY 10017
Ph. 212-599-0700
Fax 212-867-7008
Contact: Stuart Himmelfarb, V.P.

Roper CollegeTrack (S)
Roper High School Report (S)
Roper Reports (S)
Roper Youth Report (S)
Roper Green Gauge (Environmental Marketing) (S)
Roper Limobus Service (O)
Roper's Logomotive (Logo Testing Omnibus) (O)

Russell Marketing Research Inc.

1775 Broadway
New York, NY 10019
Ph. 212-246-4343
Fax 212-246-4489
Contact: Alan C. Russell
Qualitest-NYC MSA (O)

Simmons Market Research Bureau

420 Lexington Ave.
New York, NY 10170
Ph. 212-916-8900
Fax 212-916-8918
Contact: Joan Chiaramonte
Kids Study (S)
Simmons Teen Age Research Study (S)
Study of Media and Markets (S)

Lee Slurzberg Research, Inc.

168 Linwood Plaza, 3rd Flr.
Ft. Lee, NJ 07024
Ph. 201-461-6100
Fax 201-461-6102
Contact: Lee Slurzberg
LSR New York Hispanic Omnibus (O)
LSR New York Hispanic Mkt. and Cable Television (S)

Southeastern Institute of Research

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

Starch INRA Hoepfer, Inc.

205 E. 42nd Street
New York, NY 10017
Ph. 212-490-3197
Fax 212-867-7008
Contact: Larry Schneider
Starch Plus (S)
Starch Ad Readership Studies (S)
Starch Editorial Research Service (S)

Strategy Research Corporation

100 NW 37th Avenue
Miami, FL 33125
Ph. 305-649-5400
Fax 305-649-6312
Contact: Raul Lopez, Sr. V.P.
STAR - Spanish Television Audience Ratings (S)
SRC Hispanic Omnibus (O)

Talmey-Drake Research & Strategy, Inc.

100 Arapahoe, Suite 4
Boulder, CO 80302
Ph. 303-443-5300
Fax 303-447-9386
Contact: Paul Talmey
Colorado Omnipoll (O)

Teenage Research Unlimited

601 Skokie Blvd.
Northbrook, IL 60062
Ph. 708-564-3440
Fax 708-564-0825
Contact: Peter Zollo
Teenage Marketing & Lifestyle Study (S)
Teenage Marketing & Lifestyle Study (O)

Total Research Corporation

5 Independence Way · CN 5305
Princeton, NJ 08543-5305
Ph. 609-520-9100

Fax 609-987-8839
Contact: James P. Alleborn, V.P. Mktg.
EQUITREND® (S)

Trendata, Inc.

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

The Unidex Reports

1260 Winchester Pkwy
Smyrna, GA 30082
Ph. 800-528-5342
Fax 404-434-4097
Contact: Matthew Ford
The Unidex Report (S)
The High Balance Quarterly (S)
The Business Owner & Professional Quarterly (S)

U.S. Travel Data Center

1133 21st Street NW, 8th Flr.
Washington, DC 20036
Ph. 202-293-1040
Fax 202-293-3155
Contact: Steven R. Jones
National Travel Survey (O)

Video Storyboard Tests

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

The Wagner Group, Inc.

53 West 21st Street
New York, NY 10010
Ph. 212-627-0066
Fax 212-727-7492
Contact: Jeff Wagner
College Scan (O)

West Group Marketing

1110 E. Missouri Ave., Ste. 780
Phoenix, AZ 85014
Ph. 602-264-4915
Fax 602-831-6844
Contact: Mr. Glenn Iwata
WestTrack Market Monitor (O)

Youth Research, CSI

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

Section Two Specialty Cross Index

Advertising

Advertising Research Corp. (ARC) (S)
Beta Research Corp. (S)
Custom Research (O)
Gallup & Robinson (S)
Graham Research Service (O)
Healthcare Communications (S)
International Demographics (S)
Marketing Evaluation/TVO (S)
NFO Research (S)
OmniTrack Group (S)
Perception Research Svcs. (S)
Simmons Market Research Bureau (S)
Starch INRA Hooper (S)
Video Storyboard Tests (S)

1993 SYNDICATED/OMNIBUS DIRECTORY

Agricultural

Doane Marketing Research (S)
MacKay & Company (S)
Market Directions (S)
Rockwood Research Corp. (O)

Asian Americans

Interviewing Service of America (O)
OmniTrack Group (S)

Automotive

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

Business-To-Business

Beta Research Corporation (O)
Erdos & Morgan (S)
Mediamark Research, Inc. (S)
Opinion Research Corp. (O)

Carpeting

NFO Research (S)

Chemical Industry

Chemark Consulting (S)

Children

Children's Market Research (S)
Creative Research Group (S)
The Roper Organization (S)
Simmons Market Research Bureau (S)
Youth Research, CSI (O)

College Students

The Roper Organization (S)
The Wagner Group (O)

Consumer(Local)

Behavior Research-AZ (O)
Dittman Research-AK (O)
Gene Kroupa & Associates-WI (O)
Market Trends-OR (O)
Market Trends-WA (O)
Metromark Market Rsch.-SC (O)
Russell Marketing Rsch.-NY MSA (O)
Southeastern Institute of Rsch.-Mid Atl. (O)
Talmey-Drake Research-CO (O)
West Group Marketing Rsch.-AZ (O)

Consumer-Canada

Canadian Facts (O)
Creative Research International, Inc. (S)
Gallup Canada (S)
Gallup Canada (O)
IMR Research (S)
Maritz Marketing Research (S)
Market Facts of Canada (O)
Market Facts of Canada (S)

Consumer-Europe

Opinion Research Corp. (O)

Consumer-U.S.

Beta Research Corporation (O)
Irwin Broh Ascts. (S)
Bruskin/Goldring Research, Inc. (O)
Cambridge Reports/Research International (O)

Cambridge Reports/Research International (S)
Custom Research Inc. (O)
Erdos & Morgan (S)
Gikas International Co. (S)
ICR Survey Research Group (O)
Maritz Marketing Research (S)
Market Directions (S)
Market Facts, Inc. (O)
Market Research Solutions (O)
Market Segment Research (O)
Mediamark Research, Inc. (S)
Monroe Mendelsohn Research (S)
Monroe Mendelsohn Research (O)
MRCA Information Svcs. (S)
NFO Research (O)
A.C. Nielsen (S)
The NPD Group (S)
Opinion Research Corp. (O)
J. D. Power and Associates (S)
The Roper Organization (O)
The Roper Organization (S)
Total Research Corp. (S)
Trendata, Inc. (S)
U.S. Travel Data Center (O)

Entertainment

Market Directions (S)
The Roper Organization (S)

Environmental

Creative Research International, Inc. (S)
The Roper Organization (S)

Executives

Opinion Research Corp. (O)

Financial

Clantia/NPDC (S)
Erdos & Morgan (S)
IntelliQuest, Inc. (S)
IntelliQuest, Inc. (O)
Market Facts of Canada (S)
OmniTrack Group (S)
The Unidex Reports (S)

Food/Beverage

Children's Market Research (S)
Com-Sci Systems (S)
Danis Research (S)
Ehrhart-Babic Ascts. (S)
HealthFocus, Inc. (O)
Market Facts of Canada (S)
MRCA Information Svcs. (S)
The NPD Group (S)
Simmons Market Rsch. Bureau (S)

Health Care/Medical

Beta Research Corporation (O)
Beta Research Corporation (S)
Irwin Broh Ascts. (S)
Healthcare Communications (S)
HealthFocus, Inc. (O)
Hospital Research Ascts. (S)
Hospital Research Ascts. (O)
MRCA Information Svcs. (S)
OmniTrack Group (S)

Hispanic

Behavior Research Center (S)
D.H. Macey Division (O)
D.H. Macey Division (S)
Market Development (O)
Market Segment Research (O)
NuStats (S)
Lee Slurzberg Research, Inc. (O)

Strategy Research Corporation (S)
Strategy Research Corporation (O)

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Opinion Research Corp. (O)

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American Sports Data (S)
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Mediamark Research, Inc. (S)
Opinion Research Corp. (O)
The Roper Organization (S)
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Strategy Research Corporation (S)
Total Research Corp. (S)

Mothers

Children's Market Research

Restaurants/Fast Foods

Market Facts of Canada (S)
The NPD Group (S)
Restaurant Research Ascts. (S)

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A. C. Nielsen (S)

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Irwin Broh Ascts. (S)
Marketing Evaluations/TVO (S)
MRCA Information Svcs. (S)

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ICR Survey Research Group (O)
Market Development, Inc. (O)
Simmons Market Rsch. Bureau (S)
Teenage Research Unlimited (S)
Teenage Research Unlimited (O)

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MRCA Information Svcs. (S)

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LISTING ADDITIONS

Please add the following facility to the 1993 Directory of Telephone Interviewing Facilities:

Gene Kroupa & Associates
222 North Midvale Blvd., Ste. 29
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Ph. 608-231-2250
Fax 608-231-6952
Contact: Gene Kroupa
15-0-15-15

Please note the following corrections to the 1993 Directory of Telephone Interviewing Facilities (corrected text shown in boldface):

On page 72, the phone number for Datatrack, Inc. should be 616-954-**0303**.

On page 76, the address for Bruskin/Goldring should be Bruskin/Goldring
100 Metroplex Dr.
Edison, NJ 08817

CORRECTIONS

In the Whaley Research & Associates ad on page 2 of the May issue, the phone and fax numbers should read as follows: phone 800-283-4701; fax 800-283-4733.

Just a reminder...

The August/September issue of *Quirk's Marketing Research Review* will feature the 1993-94 Researcher SourceBook, listing over 3,200 providers of marketing research products and services

Trade Talk

continued from p. 46

to determine their interest in healthy foods and then to find out if they will participate in the written, self-administered questionnaire that is the basis of the study.

For the 1992 study, the 300-question survey covered topics from attitudes towards personal health and perceptions of companies and brands to product usage and attitudes toward food. It was sent to about 2,000 U.S. consumers identified through the recruiting as food shoppers with an interest in healthy foods. Just over 1,000 questionnaires were returned in usable form, for a response rate of 51%.

Five segments

Based on their answers, the respondents were grouped into five segments: managers, investors, healers, strugglers and disciples. In the 1992 results, roughly half the respondents were managers, just over a quarter were investors, healers and strugglers each weighed in at about 10%, and disciples were the smallest group at 2% of the total.

Managers think about healthy eating in the short term; they know that eating well makes them feel better right away. Investors eat well as a preventive measure so they will stay healthy. Healers feel they have health problems and therefore must make dietary and other lifestyle changes to regain good health. Strugglers are interested in healthy eating but can't stick to it, bouncing between a good and bad diet. Disciples are committed healthy eaters. They follow a strict regimen, for health or spiritual reasons.

As with any study that measures consumer habits and preferences over time, the majority of the HealthFocus questionnaire stays the same from year to year. Of course, the sponsors' proprietary questions can change and some questions are included to get a feel for opinions on hot issues of the day, Gilbert says.

"For example, we had more questions about the environment and food safety in 1990 than in 1992, but we put more questions in about food health claims in 1992. For the most part we're trying to protect the trend information. When we do it in '94, about 95% of the questionnaire will be the same as it was in '90 and '92."

Thus far, two food companies and a health organization have signed on for 1994. Past sponsors have included Quaker Oats, Campbell Soup and the National Livestock and Meat Board.

Incentives go to charity

HealthFocus puts an interesting twist on the idea of respondent incentives. Instead of

the usual dollar gratuity for respondents, those who complete the HealthFocus survey choose a charity from a list of eight, to which HealthFocus contributes \$2. "We feel good about it because it's a way that as a company we can contribute to these organizations," Gilbert says. "We get a good response rate and I think the respondents feel good about it too. We've actually had people send the questionnaire back with a check for additional money! It's also an interesting research question: for example, who's picking environmental charities versus the National Cancer Society?"

Pool for special projects

A useful byproduct of the survey is a pool of respondents who can be contacted for more specialized research projects. At the end of the questionnaire, those interested in participating in other studies are asked to provide their name, address, and phone number.

"We can take, for example, a new product idea to these people in a telephone survey," Gilbert says. "We don't need to get all of their demographics because we have the information collected already. It's proven to be a real interesting way to go back and test an idea with a group of people and be able to look at their attitudes and practices in detail."

"For example, recently we wanted to interview people who say that they use soy milk and ask what they would think about a soy milk fortified to be more nutritionally equivalent to dairy milk. We wanted to find out if they liked the idea and how much they would be willing to pay for it. With a quick little 10-minute telephone interview we have a pretty good idea of who's going to be the receptive market."

Moderation in '94

Gilbert expects to see further evidence of moderation in the 1994 survey, along with more respondents who call themselves vegetarians. Though as she found recently, the '90s definition of vegetarian seems to be a bit different than the one found in Webster's. Nowadays, the ranks of self-described vegetarians are swelling with folks who shun red meat but still eat poultry and seafood. "I was at a party wearing a *Vegetarian Times* T-shirt," Gilbert says, "and a woman came up to me and said, 'I'm a vegetarian too! Of course, I still eat chicken and fish...'"

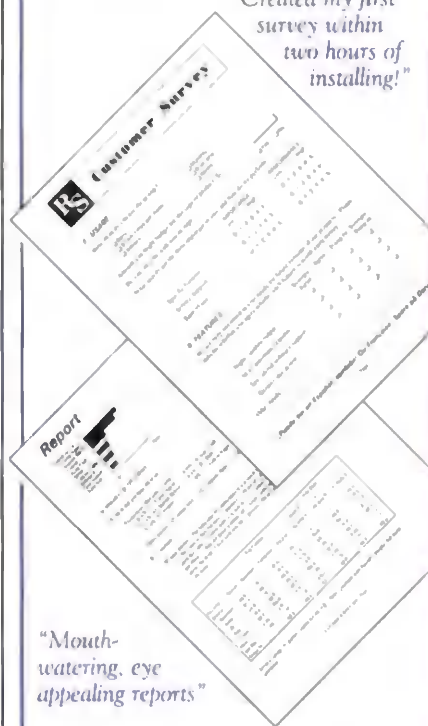
"Within the low-fat trend we're seeing an emerging trend toward vegetarianism that I think is going to come up much stronger in the '94 survey; not necessarily that people are vegetarian in the classic sense of not eating any meat, but they're eating meatless meals more often." □

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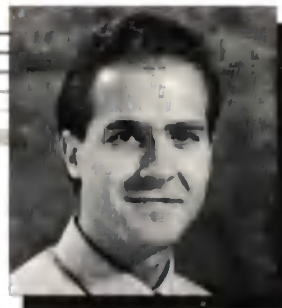
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By Joseph Rydholm
managing editor

Syndicated study looks at healthy eating habits

Lately, I've gotten the impression that Americans have fallen off the "nutrition wagon" and are back to wolfing down hamburgers and banana splits. For example, *The Wall Street Journal* recently reported that steak restaurants are making a sizzling comeback, dessert sales are up, and hearty fare is all the rage at fast food joints. Is our love affair with low-fat over? Linda Gilbert doesn't think so.

Gilbert is president of HealthFocus, an Emmaus, Pa.-based consulting firm that works with the food industry. Since 1990 the company has conducted a bi-annual study, the HealthFocus on U.S. Consumers. "People are going back to eating some red meat and desserts—indulgence kinds of foods—but I think they're going to do it more thoughtfully," she says. "I think that consumers are smarter than perhaps a lot of marketers and advertisers give them credit for. They look at what they're doing across the board. There is more evidence that people are balancing their diet, taking a big-picture view of it all."

The syndicated study—subtitled "A Trend Study of Public Attitudes and Actions Toward Healthy Food Choices"—was designed to provide a comprehensive look at the behavior of people who say they eat healthy. "We started the study to have a database of more detailed information that we could use in our decisionmaking for clients," Gilbert says.

As well as providing an ongoing yardstick of health-conscious consumers' eating habits and opinions, the study was intended to prove that consumers really do have an interest in healthy eating. "There's been some questioning of whether people really are interested in [eating healthy]," Gilbert says. "Looking at our survey results, it's clear that this is important to people. There is a compelling interest in the role of diet and nutrition in disease prevention. But it seems that people are changing their approach in some respects. They're recognizing that the quick-fix solutions aren't real solutions at all. Rather, they're looking for things they can live with over the long haul,

that they can adopt on a lifestyle basis.

"Consumers are very demanding; they want it all. I think that the food industry has not responded with the best-tasting kinds of products, but many of those products are getting better. Toward that end consumers are less likely to be looking for things that require much compromise, because they're not willing to make compromises over the long haul. They say, 'I might be willing to do it over six weeks on a diet but I'm not going to do it for the next 30 years of my life.'"

Everybody wins

One of the beauties of a syndicated study is that in most cases, it's a good deal for everyone involved. The research company undertaking the study offsets its costs by signing up sponsors. Sponsors, in turn, usually get quite a bit of information—including responses to proprietary questions—at a nominal price.

Respondents for the HealthFocus study are recruited through phone interviews, first

continued on p. 45

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<p>104. Questionnaire Construction Workshop Los Angeles Nov. 9-11 New York Jan. 25-27 Cincinnati Mar. 8-10 Cincinnati May 10-12 Atlanta June 28-30 Cincinnati Aug. 9-11</p>	<p>504. Advertising Research Cincinnati Nov. 10-20 Cincinnati Feb. 24-25 New York Apr. 22-23 Cincinnati July 22-23</p>
<p>105. Questionnaire Design: Applications and Enhancements Los Angeles Nov. 17-19 New York Jan. 29-31 Cincinnati Mar. 11-12 Cincinnati May 13-14 Atlanta July 7-8 Cincinnati Aug. 17-19</p>	<p>505. Positioning and Segmentation Research Cincinnati Nov. 17-18 Cincinnati Feb. 22-23 New York Apr. 20-21 Cincinnati July 20-21</p>
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