Quirk's

MARKETING RESEARCH

Review

GE MEDICAL SYSTEMS MONITORS ITS PERFORMANCE WITH TRACKING STUDIES

Customer satisfaction directory

October 1993

Quirk's
MARKETING RESEARCH
Review

Vol. VII, No. 8 October 1993

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Cover
GE Medical Systems Group pays close attention to customer satisfaction through two tracking studies. Photo courtesy of GE Medical Systems Group.

Quirk's Marketing Research Review, (ISSN 08937451) is issued 10 times per year- January, February, March, April, May, June/July, August/September, October, November, December– by Quirk Enterprises, Inc., 6607 18th Ave. So., Minneapolis, MN 55423. Mailing Address: P.O. Box 23536, Minneapolis, MN 55423. Tel.: 612-861-8051; Fax: 612-861-1836. Second class postage paid at Minneapolis, MN and additional mailing offices.

Subscription Information: U.S. annual rate (ten issues) $40; two years (20 issues) $76; three years (30 issues) $112. U.S. single copy price $10. Change of address notices should be sent promptly; provide old mailing label as well as new address; include ZIP code or postal code. Allow 4 to 6 weeks for change. **POSTMASTER**: Please send change of address to Quirk's Marketing Research Review, P.O. Box 23536, Minneapolis, MN 55423.

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For GE Medical Systems each customer is... a market of ONE

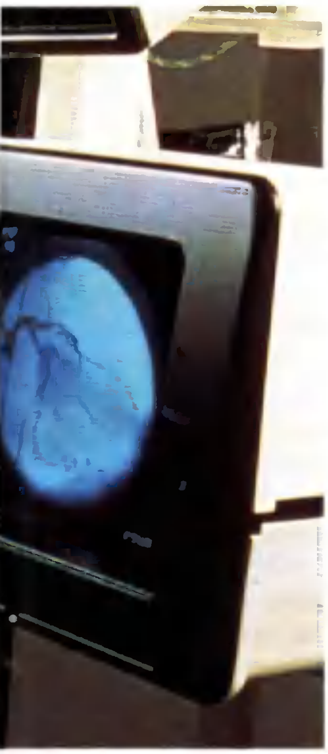
Editor's note: Jamal Din is vice president/research for Kennedy Research Inc., a Grand Rapids, Mich., market research company.

by Jamal Din

With a core market of radiology departments in approximately 7,500 hospitals and clinics in the United States, GE Medical Systems Group has a small customer base relative to many industries. Soliciting the opinions of these customers who have made six- (or even seven-) figure investments in GE diagnostic imaging equipment is a high priority for GE Medical Systems.

Milwaukee-based GE Medical, a business group of the General Electric Co., uses two types of mailed surveys to encourage customers to voice their opinions. The first survey is called the post installation tracking study, which asks for the customer's opinion of the sales process, preinstallation, delivery, installation, training and product performance for their recent purchase. The second survey is the sales and service tracking study, which asks the customer to evaluate GE Medical's total account management and service delivery performance. This survey is mailed to every GE Medical customer annually.

"Our customers probably know us as well as we know ourselves, because they have multiple relationships with us," says Dennis Cooke, GE Medical customer satisfaction process manager. "It is essential that we understand our customer's level of satisfaction throughout every stage of the relationship. Our post installation survey measures our customer's satisfaction level with an individual transaction, and our sales and service survey measures our customers' satisfaction level with our overall performance at the account."



Every customer is important

With its relatively small customer base, GE Medical cannot afford to take customer satisfaction lightly. A disgruntled customer or two may have little impact on a consumer products company selling low-price/high-volume items, but it can have a much greater effect on a high-tech manufacturer selling big-ticket equipment to a few key customers.

"We can't afford to lose any customers. We look at each customer as a market of one," Cooke says. "We simply must be sure that our customers are satisfied with their investment." The continuous customer satisfaction surveys are key sensing tools used to ensure client satisfaction.

> ***"Our customers probably know us as well as we know ourselves, because they have multiple relationships with us. It is essential that we understand our customer's level of satisfaetion throughout every stage of the relationship."***

Customer satisfaction survey evolution at GE Medical

With worldwide sales of well over $3 billion, GE Medical Systems is the world's largest manufacturer of diagnostic imaging systems. Product lines include computed tomography, magnetic resonance imaging, X-ray, ultrasound, nuclear medicine and positron emission tomography equipment, all of which help physicians look inside the human body without surgery.

GE Medical Systems inaugurated the post installation survey five years ago, in an effort to strengthen its commitment to customer satisfaction. The sales and service survey was spun off three years later. GE Medical's market research department developed the original post installation survey and sales and service survey. Kennedy Research Inc., a Grand Rapids, Mich., market research company, helped GE Medical Systems develop these surveys and now conducts them on an ongoing basis.

"We saw the need to obtain structured input from our customers to drive customer-focused improvements in our business," says Lorna Young, market research manager, GE Medical Systems.

The surveys achieved their initial goal — obtaining customer feedback — but GE Medical did not have an ongoing process to resolve the issues the surveys uncovered. In late 1991, GE Medical created a customer satisfaction department for this purpose, with the additional mission of raising overall customer satisfaction. The new department took on responsibility for the surveys.

Initially, the post installation survey consisted of a quarterly five-page questionnaire. The survey included every customer who acquired a new GE Medical device within the preceding three months.

Study results were distilled a variety of ways. Since the findings addressed the performance of several different departments at GE Medical, Kennedy Research tailored a potpourri of written reports to the specific needs of various departments, including a monthly one-page summary of key findings from

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Spur of the

Taco Bell gets fresh responses for its satisfaction

by Julia Nufer

Editor's note: Julia Nufer is a senior account manager with Maritz Marketing Research Inc., in Los Angeles.

The fast-food restaurant category grew by 5.2% in 1992, yet Taco Bell's sales grew by 21%. Taco Bell's annual sales per unit rose from $579,000 in 1987 to $866,000 in 1992, a compound annual growth rate of 8.4%. How can a company grow so much, year after year? According to John E. Martin, Taco Bell's president and chief executive, the restaurant "has been listening to our customers. We committed ourselves to delivering value to the customer ... We decided to deliver what they asked for, not what we thought they wanted."

Taco Bell keeps in touch with customers through many channels. One of the most important ways is its Customer Satisfaction Program, now in its fifth year. The program is so valuable that after three full years of implementation in a randomly selected national sample of restaurants, the company has expanded the program to include virtually every company-owned restaurant in the United States and Canada — over 2,200 stores.

What are the keys to making Taco Bell's program work so well? One is its strong foundation. Over a year of research preceded the first national rollout in 1990. Extensive research was done to determine what drives

moment

research with "moment-of-truth" surveys

customer satisfaction. The questionnaire was designed to incorporate those elements that are both important to the customers and operationally actionable, items such as the cleanliness of the restaurant, speed of service, and friendliness of the staff — instead of issues the restaurant manager can't affect, such as the convenience of the location. The questionnaire format, content, and many aspects of the data collection process were pretested extensively to fine-tune them prior to rollout. The payoff: a process that assures Taco Bell of excellent customer information.

Why "moment-of-truth" surveys?

The data collection process is a key component of any customer satisfaction program. It must take into consideration how involved the customer is in the transaction. For most people, buying a car is a highly emotional, memorable and costly purchase decision; buying a taco is not. For transactions that are frequent, low cost and low involvement (like most fast-food purchases), it is important to catch the customer at the "moment of truth," at the time of the transaction. Surveying customers after the moment of truth doesn't work as well since memories of the food, the service or the environment quickly fade. As a result, people may forget key components of the experience, or may mistakenly recall (and rate) the wrong meal, the wrong location, etc. Surveying at the moment of truth helps ensure that the results are more accurate, sensitive and discriminating — and therefore more useful to the restaurant manager.

Taco Bell surveys customers at the restaurant. Customers are asked to rate their experience that day, in very specific terms. The survey is distributed over the course of one day by a professional interviewer, who also collects the self-administered questionnaires. The survey is short and easy to complete, and cooperation rates are high. There are enough responses to report the results at the restaurant level, which is essential.

Other methods of collecting the data have been considered. Some options are:

Distribution: Restaurant staff actively distribute the surveys, or surveys are made available at the restaurant for customers to take if they wish.

Collection: Restaurant staff collect the surveys, or customers drop them in a locked box as they exit. Customers might even mail questionnaires (postage prepaid) to a central location for processing.

All of these methods are appropriate and are used in some circumstances. But they are not appropriate for this program primarily because of the lack of control over who receives and completes the survey. Control is extremely important, since Taco Bell uses the ratings as part of the performance evaluation of its managers. The program has high credibility with all levels of management because a neutral party, the interviewer, is collecting the information, and because the evaluation comes directly from the customers of the individual store.

Making it work

The survey process is very simple

The program hos high credibility with all levels of management because a neutral party, the interviewer, is collecting the informatian, ond because the evoluotion comes directly from the customers of the individuol store.

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Do's & don'ts of customer satisfaction

by Joanne Ulnick

Editor's note: Joanne Ulnick is a partner in Ducker Research Co., Bloomfield Hills, Mich.

The first "don't" to keep in mind is that it is not customer satisfaction for which companies should strive, it is market satisfaction. We believe that the term "customer satisfaction" is a misnomer, as any such project should include non-customers and former customers. In addition, your company's performance should be measured vis-a-vis your competitors'. The essence of a satisfaction effort should be to assess market perceptions of your company and to determine ways in which your company can improve the products and services that it offers to all market segments.

Based on our experience involving market satisfaction studies, we offer the following guidelines. (The following list of do's and don'ts has been developed over the last 10 years and is based on actual trial-and-error experience.)

Do's:

1. Use an unbiased sample. When designing the sample, it is essential that once potential respondent lists are developed (i.e., customers, non-customers, former customers) a random selection process is used. This will ensure that the results are not biased by any particular group of respondents. For example, if top-tier customers are targeted for interviewing, the results surely would be biased by the level of service often provided to such customers.

2. Use of the voice of the customer. It is essential that the evaluation criteria against which supplier's performance will be measured are based on the terminology used in the marketplace. "Do not speak research language," says Mark Daniels, market research analyst with Motorola's Paging Products Group, "speak the customer's language." The criteria should reflect all the elements that are part of the purchasing process and reflect the thought process of the respondents. Internal company terminology should not be used during the interviewing process.

3. Pre-test all interview outlines. Part of developing the evaluation criteria is the pre-testing phase. Such pre-tests allow the researchers to modify and finalize interview outlines in order to incorporate the voice of the customer. The results of pre-test interviews include:

- Proper identification of evaluation criteria
- Definition of criteria using the words of the customer
- Validation of research methodology
- Test of interview outline flow and questioning technique

4. Define performance targets. To develop and implement improvement strategies that address the concerns of the marketplace, specific quality targets for key evaluation factors must be sought. All respondents should be queried about their definitions of ideal and acceptable levels of performance. This information will help develop actionable steps for improvement.

5. Use experienced researchers. To obtain specific and accurate performance targets, use experienced researchers. By this we mean that researchers should be experienced in both market satisfaction and in the industry under study. These researchers are able to probe in depth as well as accurately and quickly assess respondent input (and probe further, if necessary). "It's critical to use a firm that knows your business or industry," says Hughes Petteway, project manager of Allied-Signal Aerospace Co.'s Market Analysis Group.

Gretchen Ackerman, marketing manager with Petrolite

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Selection of a stratified random sample

by Steven J. Fuller

Steven J. Fuller is president of InforMedix Marketing Research, Inc., Highland Park, Ill.

Stratified random sampling is a technique used to improve the accuracy of survey results or to lower the cost of a survey without losing accuracy. With a properly designed sample, the total number of survey contacts can sometimes be reduced by more than 50%, compared to simpler plans, without losing any accuracy in the results. The technique is often used in preparing random samples for large quantitative surveys.

Stratified random sampling involves dividing the market up into segments that are different from each other, studying each of the segments separately, then putting the separate results back together using a weighted average. This weighted average of several precise measurements can be better than a general measurement of the whole diverse market.

To gain the greatest benefit from this technique, it is important to have some advance information about the market being surveyed. In particular, one must recognize that the total market contains subsets that are different from each other — and be able to say how the subsets differ. It is common to subdivide U.S. markets into groups that differ by geography, volume of purchasing, age, sex and so on.

This report explains the benefits of stratified random sampling, and demonstrates how to construct such a sample, using real data. The example comes from a research investigation of the market for patient monitors in U.S. hospitals, but the techniques can be applied to almost any product or customer group.

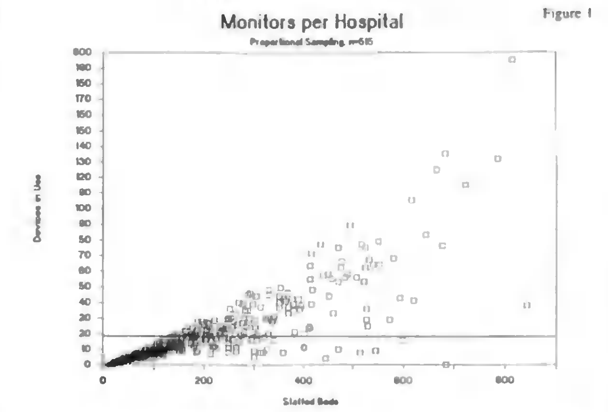
The easy way — proportional sampling

To understand the method of preparing a stratified random sample, and the benefits this technique can provide, it is helpful to start by describing an easier and more common method used for selecting a sample. Very often, samples are chosen with a simple technique called "proportional sample allocation," which is no more than picking survey respondents at random from the complete list of available respondents, called the "universe" of respondents.

For instance, if we want to know what fraction of the hospitals in the country use a particular type of high-tech patient monitor, we can just survey, say, 10% of all the hospitals in the AHA Guide, or another complete list of hospitals. In this case, the sampling proportion is 10%, and if the universe contains 5,151 hospitals, we would survey every tenth one in the list, until 515 sites had been interviewed. The results of the survey would give a fairly accurate estimate of the average number of monitors per hospital, and the total number of monitors in the U.S.

The results of such a survey are shown in the graph in Fig. 1, and the horizontal line points out the average number of monitors per hospital, which is about 20.

Figure 1



Wasted telephone calls

While this is a useful result, the question remains whether it was acquired in the most economical way. Many research analysts would look at the graph in Fig. 1, and wonder what they really learned from all the data points forming the dense black cloud in the lower left corner. And they might be uncomfortable with the small amount of solid information they have about larger hospitals, where the data points are few and sparsely distributed.

There are two reasons why this sampling plan wastes the researcher's time and adds unnecessary charges to the telephone bill or the business reply mail account. One is that it may not match a company's marketing priorities; the other is that a good deal of the information collected is statistically useless. These problems, and ways to solve them, are explained below.

The marketing problem

The problem from a marketing perspective is that most manufacturers of medical products are more interested in large hospitals, which drive the majority of their sales and product development initiatives. So any survey that contacts many small hospitals at the expense of sampling the large ones will be questioned by the sales manager, if not the company's statistician. The proportional allocation which gave the data in the graph is presented in Fig. 2.

Figure 2
Proportional Sampling Plan: 10% of Market

Hospital Size (Staffed Beds)	Total Hospitals Available	Number of Respondents	Percent of Universe Sampled
1 - 24	234	23	10%
25 - 49	871	87	10%
50 - 99	1,073	107	10%
100 - 199	1,218	122	10%
200 - 299	773	77	10%
300 - 399	443	44	10%
400 - 499	238	24	10%
500 +	301	30	10%
Total Market	5,151	515	10%

It is easy to see that small hospitals accounted for a very large part of this survey: 217 respondents, or over 40% of the total, were hospitals under 100 beds. This is because 40% of the hospitals in the U.S. are under 100 beds, and the proportional allocation scheme required surveying 10% of hospitals of all sizes. But unless the company has a particular product strategy aimed at small hospitals, it would be an error to focus so much of the survey on small customers.

Ten percent of the large hospitals were contacted, too. But since there are relatively few large hospitals, only 98 responses were gathered from sites with more than 300 beds. This means that less than 20% of the survey provided information about a market segment that is usually of great importance to medical market researchers.

From a marketing standpoint, it may be acceptable to arbitrarily eliminate some parts of the hospital market altogether. Many survey planners do this by excluding hospitals under 100 beds, long-term care hospitals, psychiatric hospitals, Veterans Administration sites and so on. Others decide from the outset to survey only 1% of the smallest hospitals, while developing a properly stratified sample for the rest. There is nothing wrong with these solutions, as long as the researcher is willing to settle for less accurate information about the under-sampled parts of the market.

The statistical problem

The second concern is statistical, and should be kept in mind when planning any market research survey: When you have enough information to draw conclusions with confidence, it is time to stop collecting data. In the example, it is clear that small hospitals don't vary widely in their use of monitors. After this became evident (probably after a few dozen interviews), nothing useful was gained by continuing the survey to hundreds of small hospitals.

With survey results such as those in Fig. 1, the researcher can be extremely confident in drawing conclusions about hospitals under 200 beds. Among larger hospitals, though, especially those over 400 beds, it is anyone's guess what the average number of monitors per hospital might be. This is because large hospitals vary greatly in their use of this product, and the survey has not gathered enough information to state any conclusions with confidence. To demonstrate this statistically, the chart in Fig. 3 shows 90% confidence intervals for market estimates in each size segment.

Figure 3

Accuracy of Results: Proportional Sampling

Hospital Size (Staffed Beds)	Percent of Universe Sampled	90% Confidence Interval
1 - 24	10%	+/- 18%
25 - 49	10%	+/- 6%
50 - 99	10%	+/- 5%
100 - 199	10%	+/- 5%
200 - 299	10%	+/- 7%
300 - 399	10%	+/- 11%
400 - 499	10%	+/- 14%
500 +	10%	+/- 20%
Total Market	10%	+/- 5.33%

It is obvious that a proportional sampling plan has yielded little variation among small hospitals, and quite a lot of variation among large ones.* The most important result is that the overall accuracy is no better than plus or minus 5.33% (for a 90% confidence interval). Narrowing this wide range is a central goal of stratified random sampling.

Incidentally, it is quite common to find results like this within the hospital market — there is nothing unique, statistically, about the market for patient monitors. In many ways, small hospitals are alike, while large hospitals differ in their buying patterns and use of products. Some factors that can cause large hospitals to be so diverse are their efforts to specialize in particular areas of medical care, participation in multiple group purchasing contracts, and widely varying economic conditions encountered by urban hospitals.

**The smallest bed-size category, hospitals with 1-24 beds, also contains a large statistical variation. This is because all of the hospitals had either no monitors or a single device, giving an average which is not close to either of the data points. However, this finding was considered to be sufficient information about the smallest hospital group, and the segment was eliminated from any further survey work.*

Stratification

Optimal Allocation using a stratified random sample solves the statistical problem found with proportional allocation, by ensuring that enough respondents are surveyed in each segment to provide the greatest possible level of accuracy for the overall results.

The key lies in being able to identify subsets of the market where answers vary widely, and others where answers are essentially the same. It is very common to subdivide hospital markets by bed-size, but only a little more effort is required to segment by geography as well. Many surveys of hospitals use two- or three-dimensional stratification schemes, resulting in dozens of market segments. To keep the explanations simple, the example used here segments the hospital market only by bed-size.

Planning the stratified sample

In the example, the number of patient monitors in small hospitals is small, and does not vary greatly from one site to another. Optimal Allocation takes advantage of this observation by specifying a low number of survey contacts within this market segment. On the other hand, large hospitals often use many monitors, but the data points can be "all over the map." Optimal Allocation solves this problem by indicating that more survey responses should be found in this segment.

Statistical textbooks provide formulas to determine just how large the sample should be in each market segment, to maximize accuracy and narrow the confidence intervals. These formulas state that allocation of the sample to each segment should be proportional to the segment's standard deviation multiplied by the number of potential respondents in the segment.

The results of these calculations are shown in Fig. 4. For each bed-size category, the number of hospitals in the U.S. has been multiplied by the standard deviation of the number of monitors measured in the first survey. The seven results show the proper weight to be applied to each segment in selecting a number of respondents. (As mentioned earlier, the smallest category was eliminated after the initial survey.)

Figure 4
Calculations to Allocate Respondents For a Stratified Sample

Hospital Size (Staffed Beds)	Segment Size	X	Standard Deviation	=	Weighting	Allocation of Sample
25 - 49	871	X	1.1	=	936	2.3%
50 - 99	1,073	X	1.9	=	2,035	5.1%
100 - 199	1,218	X	4.9	=	5,983	15.0%
200 - 299	773	X	8.5	=	6,595	16.5%
300 - 399	443	X	13.0	=	5,748	14.4%
400 - 499	238	X	22.7	=	5,397	13.5%
500 +	301	X	43.5	=	13,103	32.8%
Total Sample						100%

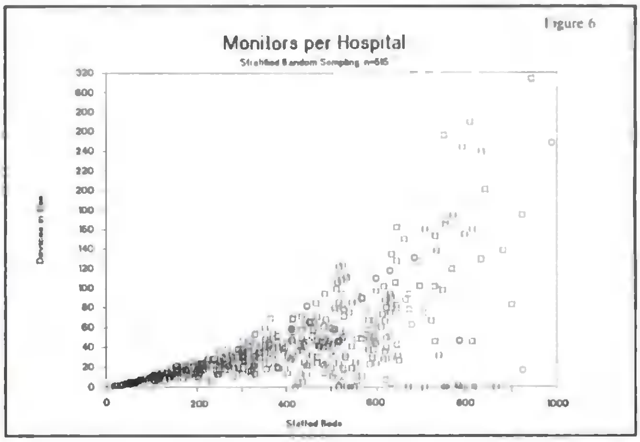
To prepare for a second survey of the monitors market, a new stratified random sample was designed. The total number of respondents was kept at 515, but these were reallocated according to the fractions given in the column on the right in Fig. 4. The difference between Proportional

Allocation and Optimal Allocation can be seen by comparing Fig. 5 and 2.

Figure 5
Optimal Allocation with a Stratified Sampling Plan: 10% of Market

Hospital Size (Staffed Beds)	Total Hospitals Available	Number of Respondents	Percent of Universe Sampled
25 - 49	871	13	2%
50 - 99	1,073	26	2%
100 - 199	1,218	77	6%
200 - 299	773	85	11%
300 - 399	443	74	17%
400 - 499	238	71	30%
500 +	301	169	56%
Total Market	5,151	515	10%

Improved results Using the new stratified sample, the survey was conducted again, and the results are shown graphically in Figure 6.



The benefits of Optimal Allocation of the sample are seen by comparing Fig. 7 with Fig. 3. Two changes have resulted from stratified random sampling. First, confidence intervals are now tighter in large hospital segments, where the number of monitors is larger and less predictable from one hospital to another. Second, the overall average for the total market can be predicted with much better accuracy: the 90% confidence interval has been narrowed from more than +/- 5% with Proportional Sample Allocation, to less than +/-3% with the Optimal Allocation.

Figure 7
Accuracy of Results: Stratified Random Sampling

Hospital Size (Staffed Beds)	Percent of Universe Sampled	90% Confidence Interval
25 - 49	2%	+/- 18%
50 - 99	2%	+/- 9%
100 - 199	6%	+/- 6%
200 - 299	11%	+/- 6%
300 - 399	17%	+/- 7%
400 - 499	30%	+/- 8%
500 +	56%	+/- 8%
Total Market	10%	+/- 2.96%

Smaller surveys or better accuracy — you can choose

Armed with information about individual market segments and the variation of responses to this type of survey, a market researcher can design a stratified random sample that meets the particular budget or accuracy objectives required for the next survey.

Obviously, with an unlimited budget, it would be possible to achieve the greatest possible statistical accuracy by surveying the entire available universe of respondents. In the real world, we are usually faced with a fixed budget, which means a limited number of completed interviews.

When budgets are limited, the techniques of stratified random sampling allow the analyst to distribute the sample across various market segments in a way that maximizes the accuracy of the results. For instance, in the patient monitors survey, the researchers found that a stratified sample of only 225 hospitals would have provided about the same overall accuracy as the original 10% proportional random sample. In other words, preparing a stratified random sample could save the client company the cost of 290 interviews — more than half of the data collection cost!

Once a researcher is familiar with the methods used, some simple spreadsheets or database calculations can make it easy to calculate the required sample size. And usually, it is well worth the effort, since computerized calculations are not expensive, but unnecessarily large research surveys are.

It is also possible to use these statistics to determine what sample size would be needed to give a desired level of accuracy in the results. If the researcher needs to be able to claim "+/-2% accuracy with a confidence level of 90%", a large sample size will be dictated. If "+/-7% with a 90% confidence level" is satisfactory, then a smaller sample will do.

Fig. 8 shows how many responses would be needed in order to arrive at 90% confidence intervals of various sizes, for the patient monitor survey used in the example.

Figure 8
Accuracy of Results with Various Sample Sizes
Stratified Random Sampling

Number of Respondents	90% Confidence Interval
120	+/- 7%
225	+/- 5.31
515	+/- 2.96%
800	+/- 2%
1,300	+/- 1%

What about first-time surveys?

Stratified random sampling techniques can be applied fairly easily, but they do require advance measurements of each segment of the market to be surveyed. In the example presented here, the required Optimal Allocation of the sample could be calculated only after the first survey had measured the standard deviation of the number of monitors within each hospital bed-size segment. If an earlier survey can be used to determine the needed statistics, then setting up a stratified random sample requires little more than some careful data-

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SURVEY—MONITOR

Keeping the customer satisfied

American consumers are most satisfied with banks, supermarkets and long distance phone companies. Upscale department stores landed in the customer-satisfaction basement, below even car repair shops, a perennial consumer bugaboo.

An OmniTel study by Bruskin/Goldring, Edison, N.J., asked 1,000 adults to rate quality of service they received. Besides the firms already mentioned, the survey included insurance companies, hospitals, discount stores, supermarkets, fast-food restaurants and car repair outfits. Banks received the highest percentage of customer satisfaction (59%). The department stores came in at 19%. Six of the industries fell below 50%, showing that most industries have considerable room for improving consumer satisfaction.

More Americans hitting the dusty trail

More Americans are spending their free time hiking and backpacking, according to a recent study by the Sporting Goods Manufacturers Association (SGMA) of North Palm Beach, Fla. The results are drawn from a syndicated tracking study conducted among 15,000 households by American Sports Data Inc.

The results of the study indicate that the number of frequent hikers and backpackers (those who participated at least 25 times a year) has risen by 25.2% since 1990, from about 1.6 million to nearly 2 million. This represents an increase in the number of diehard hiker/backpackers, since the number of overall participants has remained constant.

The availability of more trails — urban, suburban and rural — and increased interest in walking has contributed to the sport's surge in popularity. Hiking is also a fairly inexpensive activity and requires few specialized skills.

A demographic breakdown of the study reveals that:

• More women are participating, with a 66% increase in the past two years.

• Residents of the South and West are the most enthusiastic participants. The two regions combined accounted for a 36.9% increase in frequent participation, from 1 million participants in 1990 to 1.4 million today.

• Participation by residents of big cities (population of more than 500,000) grew by 61.1%, from 715,000 in 1990 to 1.15 million last year.

• The 18- to 24-year-old and 45- to 54-year-old age groups saw a drop in the number of frequent participants.

American women still like to 'shop 'til they drop'

Despite a sluggish economy, 70% of American women still love to shop, and they often do so for emotional reasons. While 20% practiced a form of "shopping therapy" when feeling down, most (65%) found that feeling good and a desire to celebrate is what propelled them into stores, according to EDK Forecast newsletter of EDK Associates, New York. But members of the "shopping therapy" group were also most likely to be brand loyal, and impulse shoppers. This group was also most likely to use a credit card for shopping, even when experiencing tight cash flow. Women without partners were most likely to be emotional shoppers. Those least likely to enjoy shopping were women aged 40 to 59, and industrial and blue-collar workers.

Teens want honesty and originality in their ads

If you want the reach the 12- to 19-year-old age group, make sure your advertising is honest and "different, creative." So say 2,107 demographically selected respondents from that group, according to a new study by Teenage Research Unlimited, Northbrook, Ill. These top two rules received 68% and 54% endorsement, respectively. Next on the list, respondents also looked for ads that are clear (42%), don't talk down to teens (42%) and are humorous (38%). A third of the respondents want advertisers to use "up-to-date phrases or slang," and a quarter recommend using "great" music, although they don't want advertisers to change the words to an original song.

Teens often equate creativity with humor — the two combined rate nearly as important as honesty. Girls were more likely than boys to say that sex shouldn't be used in ads (41% vs. 23%).

The study projects that today's 27.1 million teens will have spent $93 billion on products and services for themselves and their families in 1992. Males and females spend about the same amounts of money in total, but males, who are more likely to be employed, spend more of their own money ($43 a week vs. $34), while females, who usually do more family shopping, spend slightly more family money than males ($28 a week vs. $26). Older teens spend quite a bit more than their younger counterparts. Eighteen- and 19-year-olds spend $101 each week, compared

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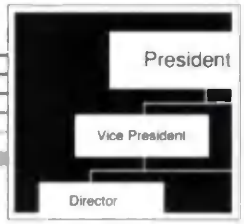
NAMES OF NOTE



Mildetta Robinson has joined *Bernett Research Services Inc.* She will be mall manager at Bernett's South Shore Plaza mall intercept facility in Braintree, Mass. **Andrea Saks** has joined the firm's Fort Myers, Fla., office as senior vice president/custom research services. She will also work in the firm's Jupiter, Fla., satellite office.

Peter Kochenthal has joined *Bruskin/Goldring Research*, Edison, N.J., as senior vice president, client services. **Bob Homeyer** has been promoted to associate project director for custom research, and **Stephanie Sinn** has joined as an OmniTel associate project director.

Joann Arndt has been appointed database product director at *Cahners Direct Marketing Services*, Des Plaines, Ill. **Edward Fielding** has been promoted to market research analyst at Cahners Research, Boston division.

Catherine Kneidl has been promoted to group vice president for quality controlled services at *Maritz Marketing Research Inc.*, based in Fenton, Mo.


Kneidl


Gilbert

Gail Gilbert has been promoted to vice president, division manager, in the firm's full-service division in St. Louis. **William Kattner** has joined the firm's Minneapolis office as senior account manager.


Kattner

Edward (Ted) Byers has been appointed president and CEO at *Cambridge Reports/Research International*, Cambridge, Mass., a subsidiary of Research International USA.

Bret Fox has been named research analyst for *Cattle-Fax*, Englewood, Colo.

John Golanty has joined Chicago-based *Conway/Milliken & Associates* (CMA) as senior vice president and member of the CMA management group.

Dr. David Jacobson has joined the New York office of *Creamer Dickson Basford Inc.* He will serve as vice president/associate research director.

Dennis Anspach has joined Minneapolis-based *Custom Research, Inc.*, as vice president.

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RESEARCH COMPANY NEWS

A La Carte Research, Syosset, N.Y., now has three focus group rooms in the same building. Each room has a separate central air-conditioning system with its own thermostat. Two rooms have a tiered viewing room with seating for 15 to 20, and an attached client lounge with a TV monitor. A La Carte also has an 85-seat theater in its office complex. For more information call Phyllis Gorin at 516-364-4004.

Ask Southern California Inc. has moved to 12437 Lewis St., Garden Grove, Calif. 92640, in the City View office plaza, five minutes from Anaheim Convention Center. Phone is 800-644-4ASK or 714-750-7566, fax is 714-750-7567. The office is Orange County's largest data collection facility. It features focus suites with a 27-foot by 28-foot conference room, an adjoining viewing room with tiered seating and writing tables for 20 observers, and adjoining client lounge with closed-circuit viewing and a private client restroom. A separate minitheater seats 50 respondents for central location testing. It has a fully equipped kitchen, including dishwasher and washer/dryer. Complimentary shuttle service by the Doubletree Hotel at The City is available to and from John Wayne Airport, the office and the hotel. For more information call Sue Amidei or Jennifer Kerstner at 1-800-644-4ASK.

American Demographics has voted **Claritas/NPDC**, Ithaca, N.Y., one the best 100 providers of marketing information in the United States. The firm won in the demographic data category for its Update current year estimates and five-year projects; and for psychographic data category, for Prizm. Criteria for selection included demographic content, general availability, geographic scope and experience.

Consumer Pulse of Baltimore has moved to new focus group and field facilities in northeastern Baltimore, 1232 Race Road, Baltimore, Md., 21237. Two suites feature a 20-foot by 36-foot group/exhibit room and an 18-foot by 26-foot group room. Each client room seats a minimum of 12 observers viewing through floor-to-ceiling mirrors. The facility has a fully equipped kitchen and telephone/WATS center. For more information contact Alice Matheny at 410-687-3400 or Detroit corporate headquarters at 800-336-0159.

Creative Research Systems has relocated to: 140 Vista View, Suite 100, Petaluma, Calif. 94952-4728. Phone is 707-765-1001, fax is 707-765-1068.

Custom Research Inc., (CRI) Minneapolis, Minn., has been selected as a finalist for the 1993 Malcolm Baldrige National Quality award. CRI will be one of four small companies nation-

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Essence, Simmons sponsor African-American survey

New York-based Essence Communications Inc. and Simmons Market Research Bureau, have teamed to create the Essence/Simmons African-American National Survey (AANS). Company officials says the AANS will be the most comprehensive, innovative research program thus far to provide a model for the systematic collection of information on the demographics, psychographics, consumer behaviors, values and attitudes of African-Americans throughout the continental United States. Consumer products companies are underwriting the initial methodology tests for the panel. Among those that have endorsed the project are AT&T, the Colgate-Palmolive Co., Polaroid Corp., Revlon, Toyota Motor Sales USA and United Distillers. The first stage of the survey is fieldwork for the methodology tests, which began Aug. 23, with a panel of 1,000 respondents. Fieldwork was conducted in New York, Los Angeles, Chicago and Atlanta. The last half will enlist 10,000 African-American respondents, recruited on-site nationwide. The panel will be available for customized concept tests, tracking studies, product-use surveys, attitude and opinion surveys. Custom surveys will use one-on-one interviews, focus groups, telephone and mail methodologies. All surveys can be targeted to specific demographic or geodemographic segments. For more information call Lewis Wilson at 212-642-0674.

Atlas Site Analyst free with $1,000 demographic buy

Strategic Mapping Inc., Santa Clara, Calif., has introduced Atlas Site Analyst (ASA), a PC-based geographic information system (GIS) software package. ASA integrates computerized maps of an area with demographic data about the surrounding population and displays the number of customers or prospects within a specific proximity to a site. Designed as an add-on feature to Atlas GIS, ASA allows users to decide which geography and type of demographic and industry-specific data to evaluate. Choices include forecasts of buying patterns for particular products, and updated census information showing age, income, race, sex, education and other variables. The software was designed for franchise operators, retail outlets, consumer goods companies, restaurant chains and real estate development firms. ASA provides three ways for users to evaluate potential sites: ring studies, trade area analysis and grid analysis. An optional set of geographic and data packages is also available for use with ASA, designed to work with the product's standard reports; included in the set are U.S. highways, city locations (census cities and places) and a choice of ZIP code or census tract boundary files. Strategic Mapping also customizes ASA data packages for specific

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High customer satisfaction scores don't guarantee customer loyalty

by Gary Miller

Editor's note: Gary Miller is chairman, Aragon Consulting Group, St. Louis, Mo.

Many readers might be surprised to learn high customer satisfaction scores don't always guarantee customer loyalty. The paradox is that customer satisfaction studies are conducted to help ensure loyalty, yet these studies do not address customer loyalty at all.

Most customers like to have choices and will naturally seek alternative products, particularly if their current supplier doesn't readily offer choices. This is even more true if customers have no choices at all. Sooner or later, these customers will switch, regardless of their current level of "overall satisfaction."

Everyone readily accepts the potential risk of a "dissatisfied" customer switching suppliers. Surprising to some — and regardless of how high "overall satisfaction" scores are — many "satisfied" customers switch for many of the same rational or emotional reasons as dissatisfied ones.

Some switch just because they can (particularly with a low-interest commodity or service, like gasoline or milk). Other satisfied customers simply like to "try new things." However, more often than not, a "satisfied" customer becomes aware of real or perceived superior competitive benefits, such as "value," "convenience," or "performance," which eventually affect repurchase intention.

The point is not that customer satisfaction is unimportant. In fact, high customer satisfaction is a minimum requirement of doing business in a competitive marketplace. As a result, the most aggressive customer-focused competitive marketers are moving beyond satisfaction to identify the components of customer loyalty, then evaluating, measuring and tracking them.

In a less competitive market like a regulated utility, where customer choice may be limited (until deregulation occurs), customers often have a narrow choice of energy alternatives (i.e., natural gas instead of electricity for water heating or cooking). Even the utility market is changing rapidly, however, and the more market-oriented energy companies are beginning to address this difference between customer satisfaction and customer loyalty.

And even in a monopoly business environment, customers exercise perhaps a more difficult choice: purchase more, purchase less or do not purchase at all.

Yet for those companies that continue to monitor only their customer's satisfaction scores, the shock of seeing a satisfied customer switch is felt all the way to the boardroom, particularly if executive compensation has been tied to achieving customer satisfaction measurement goals.

What is the best defense against succumbing to one of these shock waves? A better understanding of the relationship of customer satisfaction components to customer loyalty components on purchase intention and eventual behavior can help forecast customer loyalty.

St. Louis-based Aragon Consulting Group has studied the relationship between customer satisfaction and customer loyalty. Its studies indicate that up to 40% of a company's "satisfied" customers carry various levels of at-risk purchase intention.

This and other evidence indicates that purchase behavior has significantly more to do with the components that drive customer loyalty than those that drive customer satisfaction.

Aragon has developed a behavioral model that examines the components of customer satisfaction and the components of customer loyalty, called the customer satisfaction/customer loyalty (CS/CL) model. This proprietary model helps explain how external competitive factors relate to internal customer satisfaction components, which in turn affect the eventual purchase decision.

Each study requires that the model be tailored to fit the needs of the client. The model also can be customized to meet the diverse needs of different industries, different companies within a given industry, and different market segments served by a specific company.

Model works for business and consumer markets

The CS/CL model can be used to

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Segmentation study aims to help marketers understand diverse seniors market

by Carol M. Morgan

Carol M. Morgan is president of Strategic Directions Group Inc., Minneapolis. Further information on the research discussed in this article can be found in the book "Segmenting the Mature Market," by Carol Morgan and Doran J. Levy, Ph.D., published by Probus Publishing, Chicago.

Some 92-year-olds run marathons, while some 52-year-olds reside permanently on their couches. Such drastic differences help to explain why marketers who have decided that the mature market is truly golden are still having problems targeting their best prospects.

Realizing the mature market's incredible diversity, cutting-edge marketers have struggled to find a way of dealing with this most heterogeneous group. Using a demographic characteristic such as age or income to segment those over 50 has proven to be too simplistic.

While the importance of measuring and segmenting mature consumers by motivations, attitudes, and core beliefs has been recognized, the overwhelming majority of studies continue to be based on a demographic characteristic.

My firm, Minneapolis-based Strategic Directions Group, Inc., agrees that segmentation is a fundamental first step in reaching the mature market. In addition, we advocate taking into account attitudes and motivations which differ not only by segment, but by specific products and services.

In pursuing the elusive mature market, we first completed a national motivational segmentation study on those over 50 in 1989. In 1992, we expanded our original study, surveying an additional 3,000 persons over 50.

Our study differs radically from others on the mature market because it segmented this population on its attitudes, not on demographics or lifestyles. The attitudinal information was then combined with over 1,000 pieces of additional data which we collected on a wide range of topics, including investments, physiology and health, grandchildren, lifestyle, travel, purchasing patterns, residence, demographics, media usage, and activities.

The 50+® study is also significantly different because it segmented the same 3,000 respondents using three separate segmentation strategies. As far as we have been able to determine, a simultaneous, three-way segmentation of one market has never before been completed.

Our three distinct segmentation strategies include the Self segments, focused on attitudes toward growing older, retirement and financial planning; the Food segments developed on attitudes toward food; and the Health segments based on attitudes toward wellness and health.

By understanding the psychological dynamics of the 50+ segments, marketers can create products which appeal to the needs of specific segments. In addition, advertising can be created to reflect a segment's attitudes and preferred activities.

Media buys reaching those who not only read a publication, but have also revealed an intense interest in the product are more efficient. Finally, direct marketing efforts can use correlations between attitudes, behaviors, and demographics to reach a target segment through improved mail list selection.

Exploring only a few of the hundreds of different products our study considered yields differences among the Self, Health, and Food segments in their consumption of a variety of products.

The Self segments

Using our Marketer® proprietary segmentation system to analyze the data from our 50+® study, four Self segments developed: the Upbeat Enjoyers (22%), the Insecure (29%), the Threatened Actives (21%), and the Financial Positives (28%).

In identifying the attitudes of those over 50 toward themselves and social and financial issues, we asked our respondents to sort 60 attitude statements on such topics as finances, retirement, appearance, activities, and housing.

The statements included: 'I wish I could move to a safer neighborhood' and 'Plastic surgery is something I would consider to keep looking younger.' 'I have to admit most of my investments are conservative.' 'Being financially secure is a major concern for me,' and 'I feel really secure about my financial future,' were some of the statements related to finances.

The Upbeat Enjoyers

The Upbeat Enjoyers, who feel they have become more attractive with age, are optimistic about their futures. This active segment always wants to 'work at something.' The Upbeat Enjoyers have a median annual pre-tax household income of $37,112; a third of them have incomes of $50,000 or more.

The Insecure

The Insecure, for whom being financially secure is a major concern, are most interested in receiving special travel discounts for people over 50. This segment feels that the best years of their lives are over and that they have become less attractive with age. The Insecure have a median of $11,001. Only 10% of them have incomes of $50,000 or more.

The Threatened Actives

The Threatened Actives accept themselves as they are and have a generally positive outlook on life, although they are concerned about being crime victims. Only the Threatened Actives prefer to shop where they can get age-related discounts. The Threatened Actives agree at a low level that they are secure about their financial future. The Threatened Actives have a median income of $19,491; one in five has an income of $50,000 or more.

The Financial Positives

The financially secure Financial Positives consider themselves to be very successful people who are ready to enjoy life. Only this segment is positive toward the idea of living in a retirement community. When shopping, the Financial Positives look for value. This segment believes it is important to look as young as possible. Feeling less sexy than before, the Financial Positives are the segment most likely to be open to plastic surgery as a way to look younger.

The wealthiest of the four Self segments, the Financial Positives have a median annual pre-tax household income of $37,222. Of those in this segment, 32% have annual incomes of $50,000 or more.

Financial Positives seek youth through cosmetics

An example which illustrates the attitudinal differences between the Upbeat Enjoyers and Financial Positives and the danger of relying solely on demographics lies in their use of cosmetics.

The Upbeat Enjoyers and Financial Positives are both affluent segments, but they differ significantly in their consumption of these products. When asked about their use of 16 skin and hair products and cosmetics, the Financial Positives consistently revealed themselves to be overconsumers in these categories.

Although their incomes would allow them to purchase such products, the affluent Upbeat Enjoyers believe that they have become more attractive with age and are 'sexier than ever.' Chang-

Circle No. 214 on Reader Card

ing their appearance through the use of rejuvenating creams is of far less interest to them than to the Financial Positives. The Financial Positives, in contrast, want to look younger.

When it comes to rejuvenating products, half of the Financial Positives (50%) use a moisturizer regularly. In contrast, 38% of the Upbeat Enjoyers, slightly less than the mature population (39%), use a moisturizer regularly.

Our study shows that compared to those over 50 (22%) more Financial Positives (27%) spend 11 hours or more a week reading newspapers.

In contrast, fewer Insecure (17%) and Upbeat Enjoyers (21%) spend that much time each week reading newspapers. For optimum reach, these ads should be placed near a personal advice column, a newspaper feature which is read by more Financial Positives than the other segments. More Financial Positives (35%), as compared to the over-50 population (32%), are also reading newspaper advertising.

Advertisements in newspapers, this segment's preferred medium, will bring them to department stores to purchase cosmetics. And these products could very well be new ones; the Financial Positives display a low-level of brand loyalty toward this category.

Far more Financial Positives (53%) make five or more visits to a department store in a four-week timespan as compared to the population over 50 (32%). A more telling comparison is that only 36% of the Upbeat Enjoyers, the other affluent segment, make this number of department store visits.

The Health segments

Our study found four Health segments: the Proactives (40%), the Faithful Patients (22%), the Optimists (20%), and the Disillusioned (18%).

In identifying the needs and attitudes of those over 50 toward health-related trends and issues, we asked our respondents to sort 50 attitude statements regarding drug use, illness, doctors and hospitals, and healthy eating and exercise. The statements included: 'At this time of my life, I don't think I can do any more than I am doing to stay healthy' and 'I think it is important for older people to have their hearing checked occasionally.'

The Proactives

Committed to exercise and good nutrition, the Proactives, who trust their doctors, are also careful to take an entire prescription. The Proactives seek out 'a great deal of information about how to stay in good health.' Those in this segment believe they currently have adequate medical insurance.

With a median annual pre-tax household income of $27,404, the Proactives have the second lowest income of the four Health segments. One-quarter of the Proactives have annual incomes of $50,000 or more.

The Faithful Patients

Although the Faithful Patients are aware that they should eat well and exercise to stay healthy, they do not believe they are doing so. Instead, they rely on doctors and medications.

The Faithful Patients have a median annual pre-tax income of $32,333, only about $100 less than that of the Optimists. Among the Health segments, more Faithful Patients (29%) have incomes of $50,000 or more.

The Optimists

The Optimists, who feel that they almost never get sick, take medicine only when it is absolutely necessary. The Optimists feel quite strongly that the U.S. does not need guaranteed health care, and only they don't believe that HMOs are a good idea.

The wealthiest of the four Health segments, the Optimists have a median annual pre-tax household income of $32,430. Twenty-six percent of those in this segment have incomes of $50,000 or more.

The Disillusioned

The Disillusioned, who strongly believe that their insurance is inadequate, are adamant that the U.S. should have guaranteed health care. The Disillusioned are the least trusting of doctors. They actively seek out information about how to stay healthy and are careful to eat a balanced diet. The Disillusioned are the poorest of the Health segments with a median annual pre-tax household income of under $10,000. Only 11% have median incomes of $50,000 or more.

Reaching Faithful Patients through direct mail

The Faithful Patients are by far overconsumers of both pharmaceutical and over-the-counter (OTC) drugs, as well as physician visits. Although the same percentage of Faithful Patients, Optimists, and Proactives had made a purchase through direct mail over the last three months, the amount spent by the Faithful Patients ($100.67) is far above average. Those over 50 had spent a median of $59.83 in purchases over the past three months through direct mail. The Proactives ($57.60) and Optimists ($55.20) had spent below this average.

Faithful Patients (32%) who take three or more prescription drugs daily as compared to the population over 50 (24%) are prime targets for sellers of pharmaceuticals through mail order.

If these companies offer the value-added services desired by Faithful Patients, they could move beyond competing solely on price, successfully differentiate their offerings, and have a profitable, high-volume customer for life.

According to our study, greater numbers of Faithful Patients will be reached by placing advertisements for direct mail pharmaceuticals on network or cable television as opposed to magazines. And Faithful Patients can clearly afford to pay for the pharmaceuticals they rely on.

The Food segments

Our Marketer® proprietary segmentation system discovered three food segments: the Nutrition Concerned (46%), the Fast & Healthy (38%), and the Traditional Couponers (16%).

In identifying the needs and attitudes of those over 50 toward food trends and issues, we asked our respondents to sort 50 attitude statements regarding food and eating. The statements included: 'I'm willing to pay more for easy-to-prepare foods,' 'I am trying to cut down on the amount of salt I consume,' and 'Eating at restaurants is too expensive.'

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Market of One

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each individual survey, and a quarterly overview of the top five sources of satisfaction and dissatisfaction.

"But as the study matured, it mushroomed in terms of the type of information we wanted from it," Cooke says. "Each department was interested in a different aspect of the study, which meant that reporting the results became a fairly complicated process."

The shift toward automation

When GE Medical created the new department, the firm got together with Kennedy Research for a two-day "workout." The workout is a GE companywide initiative that encourages teams — often including GE suppliers and customers — to simplify and improve work processes. The goal of this workout session was to streamline the customer satisfaction studies by identifying ways of eliminating or simplifying some of the work that went into them.

One of the most significant changes resulting from the workout sessions was to begin loading survey data onto GE Medical's mainframe computer. An internally developed custom software program at GE allows the survey data to be rapidly manipulated in myriad ways so each department can glean exactly the information it needs, in the format it wants.

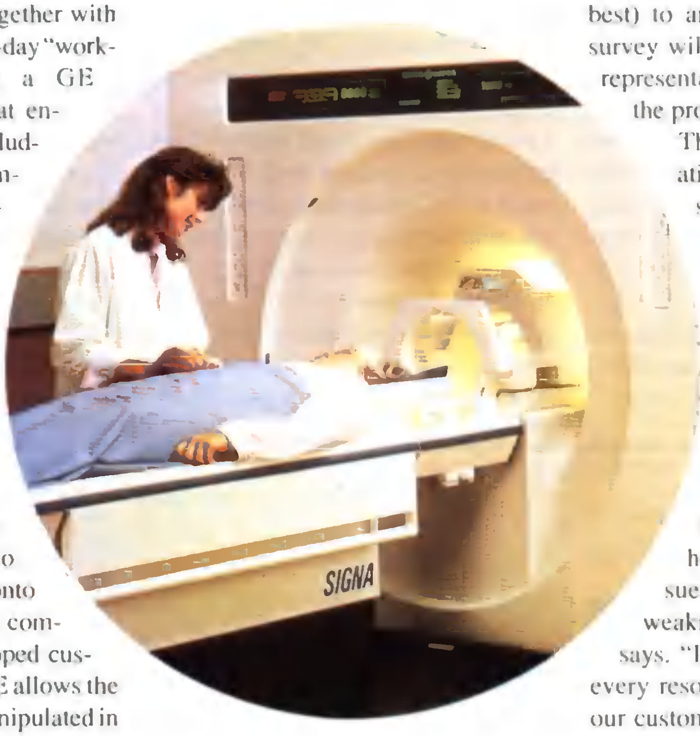
The hard copy reports once supplied by Kennedy Research became a thing of the past. Now diskettes of updated data are loaded into the mainframe every week, giving GE Medical Systems immediate access to customer satisfaction feedback.

What's more, the high degree of automation has resulted in significant savings for GE Medical. The post installation tracking study costs about 25% less than it did before its integration into the mainframe.

In addition, thanks partly to the feedback from survey respondents, the original five-page post installation questionnaire has been winnowed down to one page, with little loss of substantive information. The survey still covers virtually every aspect of the customer relationship with GE during the purchase transaction.

The one-page survey is now mailed to every customer — usually the radiology administrator — who has had a GE Medical product installed in the preceding month. The process typically yields a 50% response rate.

"In effect, the questionnaire asks our customers to grade us," Cooke says. "It is important for GE to be identified as the sponsor of the study, but we use Kennedy Research to obtain objectivity."



Customer satisfaction is critical when customers have made six- or seven-figure investments in GE Medical equipment such as this MR Signa 210 magnetic resonance diagnostic imaging machine.

Customer satisfaction and the customer issue escalation process

Though any GE employee in the world can access research data from the mainframe, primary responsibility for tracking the findings falls to a network of 12 field-based customer satisfaction specialists — 10 in the United states, one in Canada and one in Latin America.

"The process allows us to examine markets of one — each individual customer — not just charts and graphs tracking overall trends," Cooke says.

Every Monday morning, the customer satisfaction specialists monitor feedback from the weekly customer satisfaction data uploaded to the mainframe. They then work with GE field personnel to follow up immediately on any negative comment that crops up. For that matter, any customer who assigns a one or two ranking on a five-point scale (five is the best) to any overall question on the survey will promptly hear from a GE representative charged with resolving the problem.

The impetus behind the creation of GE Medical's customer satisfaction department was a cultural change that called for customer issues, or problems, to receive maximum visibility, a stark contrast to the past tendency to cover up problems.

"The cultural change we are evoking at Medical Systems is for our employees to feel that it's OK to ask for help to resolve a customer issue and [that it's] not a sign of weakness or ineptitude," Cooke says. "In fact, it is essential to use every resource available to maximize our customer's equipment uptime and overall satisfaction.

"We've designed and implemented the customer issue escalation process, which helps our field personnel resolve customer issues. Surveys with low scores and/or negative comments are among the inputs to the process. The surveys serve as a sensing tool for identifying problems that need to be addressed. The escalation process is 'closed loop': it begins with the customer's complaint and ends with the customer confirming satisfaction."

As the name implies, the customer issue escalation process is designed to escalate customer problems through the company to quickly resolve complaints. The idea is to apply the required resources of rapid resolution to the customer's problem.

"Ideally, we want to resolve problems at the lowest possible level, but when that can't be done, the customer issue escalation process allows us to address customer concerns rapidly," Cooke says. "It sounds counterintuitive, but we relish uncovering customer issues and resolving them, because it builds rapport and loyalty between GE Medical and its customers."

Results

GE Medical Systems has seen dramatic changes in its overall customer satisfaction ratings, in both the post installation survey and the sales and service survey.

When the post installation survey was inaugurated in 1988, a high percentage of customers ranked GE's delivery ratings at one or two. This has improved significantly in the survey's five-year existence. GE also has increased its applications training tools in response to feedback that training was not as comprehensive as customers had hoped. Sales and service survey overall customer satisfaction also has increased significantly over the two-years it has been in place.

Retaining customers

GE Medical Systems is in the process of implementing its customer satisfaction surveys for its worldwide customer base. Common global surveys will enable the best practice transfer and global issue identification.

Cooke says detailed customer satisfaction research for big-ticket items is essential because retaining existing customers is as — if not more — important than attracting new ones.

"GE Medical Systems is providing customer satisfaction feedback to every level of the organization to drive action plans for resolution of individual customer problems, in addition to driving broader process improvements," Cooke says. "We are committed to sharing this information throughout the organization and continuing to engage GE Medical employees in customer-focused improvement initiatives." ❑

Taco Bell

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and straightforward, but even so there is rigorous training of the interviewers to assure consistency in how the job is done. Quality of the interviewing staff is always important — especially true in this situation, since there is no supervisor on site. To ensure quality, interviewers review a training video which clearly and succinctly communicates the process. There are also extensive spot checks on the interviewers, and store managers are encouraged to contact the research firm or Taco Bell if they have any questions. Communication systems are in place to uncover store manager or interviewer issues; action is taken very quickly if a problem arises. These steps are all part of the process of ensuring the job is done right; they also build the confidence of Taco Bell managers in the program.

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Using the information to drive change

Taco Bell's Customer Satisfaction Program is powerful because every restaurant manager receives a brief and clear report showing how the facility performed on key measures; directions for change are clear. The results are also aggregated at other levels of the organization. Results are issued very fast — over 2,200 store reports, plus numerous market and zone reports, are produced within a few days of the end of interviewing. The information helps the managers more effectively and efficiently allocate their resources. Taco Bell uses the Customer Satisfaction Program results as part of their evaluation of restaurant performance. Incorporating results into the evaluation process demonstrates a commitment to

listening to the voice of the customer, and to providing customers with the experience they want—tailored to the individual restaurant level.

The Customer Satisfaction Program does more. Since interviewers survey customers in virtually every company-owned restaurant, there is an excellent opportunity to obtain information customized to a specific market or region. Some markets receive surveys which contain a few questions pertinent only to those markets. Multiple versions of the survey can be fielded on a national level to cover broader issues by varying a small portion of the survey page. Because there are so many respondents, the sample size for any one version is still very substantial. Input is sought from across the organization for these versions, which makes the Customer Satisfaction Program even more useful to the whole company.

The Customer Satisfaction Program has proven its value to Taco Bell. The "moment-of-truth" interviewing format, controlled by well-trained interviewers, provides all levels of management with the feedback they need to operate more efficiently and at the same time meet and exceed customers' expectations. The proof is in the sales and profitability figures — listening to the customer is indeed a very effective profit strategy. ❑

Do's and Don'ts

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Corp., agrees. "Using interviewers who are trained to pay attention to and record important comments made by respondents, even when they are outside the scope of a structured questionnaire format, allowed us to obtain greater value from our quantitative measurement of customer satisfaction."

6. Ask for improvement suggestions. Whether the project is being conducted internally or by an outside firm, we suggest that specific questions about areas of needed improvement be included. These questions should address product as well as service improvement areas. In addition, seek suggested priority of improvement strategies. Regardless of whether the name of the study sponsor is revealed, these questions can be incorporated into the latter part of an interview outline.

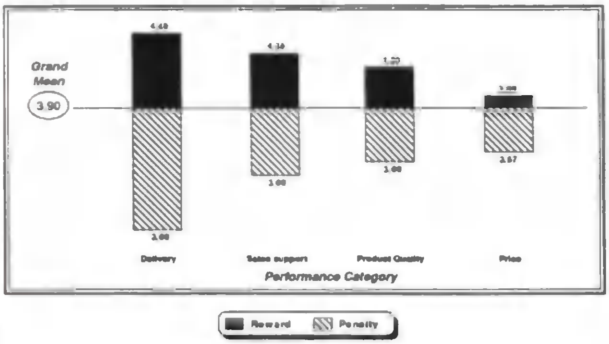
7. Include market-driven questions. Questions on the respondent's likelihood to continue purchases with a supplier or even recommend current or past suppliers to colleagues are essential. These types of market-driven questions lend insight into the overall satisfaction of respondents.

8. Include quantitative and qualitative information. Quantitative data is critical to the overall satisfaction effort. Qualitative information is equally important. Such information lends insight into the quantitative measures, bringing dynamics and causal data to the analysis.

Qualitative information typically is defined as the reasoning behind respondent perceptions. It gives you the "why" and "why not," the "how" and "please explain." Of course, qualitative data represents a challenge for analysis as respondents' thoughts need to be captured and reported in a concise manner without losing the depth of the information. "We have learned the value of paying attention to verbatim comments made by respondents while they are rating evaluation criteria on customer satisfaction surveys," says Petrolite Corp.'s Ackerman. "Getting this information adds dimension to and helps validate the respondent's interpretation of the survey's evaluation criteria. This was extremely useful in giving us a clearer picture of the customer's mindset when they think about our company's offerings in comparison to the competition's."

9. Use techniques that emphasize improvement. When analyzing data, the most useful multivariate techniques are those that assist in identifying and prioritizing improvement requirements. Simple scorecard techniques are just that — simple. They provide minimal dynamics and strategic input. Rather, techniques such as the reward-penalty analysis depict where the most impact of an improvement strategy on overall satisfaction will be yielded. For example, in the diagram shown below, Company A will increase its overall satisfaction rating from a 3.90 to a 4.45 if all its efforts are placed in

Reward-Penalty Analysis
- Effect of Individual Criteria -



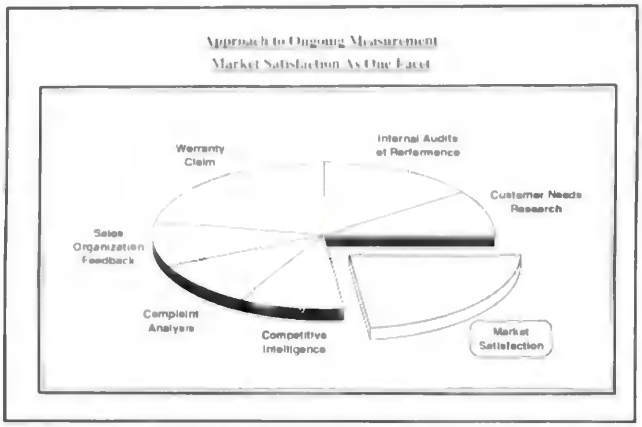
the area of delivery. In other words scoring a 5 on delivery, while all other issues remain constant, (e.g., the current performance) would improve the overall grand mean. Conversely, the penalty numbers reflect the effect if Company A were to fail (receive a 1 rating) in the specific criteria.

This type of technique not only shows the priority of improvement strategies but also the impact of such strategies on overall performance. And many companies concur that improved performance results in increased market share and/or revenues.

10. Market satisfaction is part of a continuous improvement strategy. Although an essential part of the process, market satisfaction is only one part of a continually evolving improvement process. The information should be used to augment and add dimension to an on going information gathering effort. As the exhibit below shows, market satisfaction is one element in a multi-faceted process.

Don'ts:

1. Don't assume anything about your customer. "Don't



assume anything about your customers; let them tell you their perceptions," says Motorola's Mark Daniels. The ability to objectively evaluate research findings and set aside internal paradigms is paramount and directly impacts the ability to develop and implement effective improvement strategies.

2. Don't rely on mean scores. When evaluating performance ratings, companies often consider mean scores as reflective of overall performance. Although a reliable technique, it provides minimal dimension to the analysis. A simple distribution of response has more impact and lends more insight to the analysis. Other, more complex techniques such as discriminant analysis and cluster analysis will add significant dimension to the effort.

3. Don't rely on stated importance. The debate between stated importance and derived importance continues. Although each technique has merit, we suggest that if stated importance is preferred that a derived importance also be conducted. If the results are consistent then you can feel comfortable with the fact that the stated importance is reflective of the true buying process.

4. Don't fatigue the respondents. A classic mistake that researchers often make in the field is to ask every question that they ever wanted to know. In addition, lists of evaluation criteria often exceed 30 factors. This type of interviewing surely fatigues the respondents and such fatigue certainly makes the data suspect.

A rule of thumb in market research is to maintain specific time frames for interviewing: 30 minutes for telephone interviewing and 50 minutes for personal interviewing. Evaluation criteria should not exceed 26.

To develop timely and concise interview outlines, role playing and pre-testing are helpful. When developing a list of criteria, a factor analysis is beneficial. These approaches will enable researchers to develop effective and reliable interview outlines to be used for the full-scale effort.

5. Don't do research for research's sake. The most critical guideline to keep in mind is that a satisfaction effort is only as effective as the implementation strategy proceeding it. Throughout any such effort, researchers should be asking, "How can we use this information? How can we make a change?" If a specific set of questions does not result in useful information, don't include it. ❑

Names of Note

continued from p. 22

Dan Nigbur has been named manager of customer support at *Customer Insight Co. Inc.*, Englewood, Colo.

Taylor Bond has been appointed national director of market research for *Domino's Pizza Inc.*, Ann Arbor, Mich.

M. Scott Ulnick has been named fourth partner in *Ducker Research Co. Inc.*, Bloomfield Hills, Mich. **Rhonda Bowes** has been promoted to senior analyst.

Dr. Deborah Jay has been promoted to president and CEO of *Field Research Corp.*, San Francisco. In addition, **Eleanor Murray**, executive vice president, will assume the added responsibilities of technical director; and **Mark DiCamillo**, vice president and research director, will also take over as director of The Field Poll.

Jack McAleer has joined *Healthcare Communications Inc.*, Princeton, N.J., as director of on-line client services.

Phaedra Gilpin and **Bill Burkett** have joined *Hygeia Marketing Associates*, West Caldwell, N.J. Gilpin will be responsible for project coordination. Burkett will work in the area of pharmaceutical marketing.

Philip Rosenberg has joined *ICR Survey Research Group* as vice president. ICR is a division of AUS Consultants, based in Media, Pa.

Debbie Loeb has joined Chicago-based *Loran Marketing Group Inc.* She will be responsible for managing qualitative and quantitative research projects, and developing new business.

Gerald Linda, Wesley Jones, Ph.D., and **Rosalyn Ryan** have joined *Kapuler Marketing Research* in Arlington Heights, Ill. Linda joins as senior vice president and principal; Jones joins as vice president, marketing sciences; and Ryan joins as vice president, business development.

Response Analysis, Princeton, N.J., has announced the following personnel additions and promotions: **Mary Christy** joined as statistician; **Janet Fisher-Hughes** joined as research director in the financial services group; **Nicholas Iadiccio** joined as account executive; **Gisela Joppich**, promoted to account executive for the pharmaceuticals group; **Susan Langhans** joined as senior research director in the financial services group; **Andrea McDonough** joined as research director in the telecommunications group; **Peter Milla**, promoted to vice president, computer operations; **Randy Morrison** joined as vice president, with a concentration in health-related research; and **Marjorie Schaefer**, promoted to account executive in the financial services group.

Matthew Szulik has been appointed vice president, worldwide sales, at *MapInfo Corp.*, Troy, N.Y.

Ron Duda has been appointed senior vice president at *Market Facts Inc.*, Arlington Heights, Ill., and **Carl Edstrom** has been appointed vice president. **Don Morrison**, marketing vice president, will head the new Market Facts office at 201 E. Fifth St., Cincinnati.

Duda

Edstrom

Morrison

John Mattingly and **Loren Wims** have joined St. Louis-based *Marketing Horizons Inc.* Mattingly joins as director of client services; Wims joins as project manager.

Robert E. Davis has been named a vice president at *Marketest 2000 Group*, NY. Marketest 2000 is a part of Market Facts Inc., based in Arlington Heights, Ill.

Dale Kever has joined *MarketVision Research Inc.*, Cincinnati, as director, analytical services.

Kever

David Bell has joined New York-based *Newman-Stein Inc.* as manager of account services, a newly created position. **Eve Oster** has been promoted to group head.

Woelfel Research Inc., Vienna, Va., has promoted **Jeffrey Adler** to vice president (new account development and account management), and **Robert Kuchay** to vice president (corporate technical operations and new product and services development).

Robert Higginson has been promoted to vice president of client services at *Paria Group*, Orem, Utah. **Dahl Gardner** has joined as head of health care research.

Higginson

Gardner

Julia Arnette has been appointed vice president, information technology, for marketing operations in the Detroit office of *R.L. Polk & Co.*; **Staci Fromwiller** has been named vice president-sales, fundraising, in the firm's Washington, D.C., office; and **William Heist** has been named vice president-manager, database services, in the firm's Atlanta office.

Claire Herczeg has been appointed senior project director at *Research 100*, Princeton, N.J.

Suzanne Stinson has been appointed senior vice president at New York-based *Research International USA*. Stinson will be in charge of the customer research division. Research International is a member of the WPP Group.

Jack Bedell has been named president of *Simmons Custom Research*, and **Art Savitt** has joined as vice president, custom sales. **Jeff Pogrob** also has joined the firm. He will serve as contact liaison to high-tech publishers for the CompPro study. **Gregg Lindner** has been named vice president/technical director of Simmons Syndicated Studies. Both the custom research and syndicated studies organization are divisions of Simmons Market Research Bureau Inc., based in New York and Chicago.

Margaret Beck has been promoted to manager of research and marketing programs for *Sunset Magazine*, a division of Sunset Publishing Corp. based in Menlo Park, Calif.

Joseph G. Smith, 66, died in mid-September. Smith was a psychologist, an expert in consumer research and chairman of New York-based *Oxtoby-Smith Inc.* market research company. He was elected to the Market Research Council hall of fame in 1991. Smith helped NBC choose a peacock as its symbol, at a time when most televisions were still black and white. Smith said a peacock would look better without color than any other proposed symbol.

CLARIFICATION:

In the June/July, 1993 Names of Note, we did not identify *ICR Survey Research Group* vice president/managing director **Sharon Robert**'s home office. She joined the firm's Midwest office, located in Chicago, as managing director. QMRR regrets the omission.

Survey Monitor
continued from p. 18

with $69 for 16- to 17-year-olds, and $37 for 12- to 15-year-olds. More than 70% of adolescents have a savings account and nearly 20% have checking accounts.

There's gold in that thar feminist market

Marketers who stereotype feminists do so at their peril: the feminist market is neither small, nor poor, nor careless about personal appearance. A telephone poll of 500 women conducted by EDK Associates, New York, found that over a third of all respondents considered themselves feminists. In the Northeast, Mountain and Pacific regions, that figure rose to 40%; it dipped to 28% in the South. Managerial and professional women were particularly likely to say they were feminists, at 44%.

But contrary to popular perception, feminists were more, not less, likely to care about their appearance: 63% of feminists wore makeup daily, compared with 57% of non-feminists; 72% (compared with 65% of non-feminists) manicured their fingernails, and the same percentage liked to shop. Moreover, feminists spent nearly $4 more per dress and own more shoes than non-feminists. Feminists also were more likely to try new things, including new products and new stores.

Consumers ready for a taste of the new

Moskowitz Jacobs Inc., Valhalla, N.Y., reports that it has discovered four key patterns from its 10-year research on the sensory preferences of consumers in various packaged-good categories.

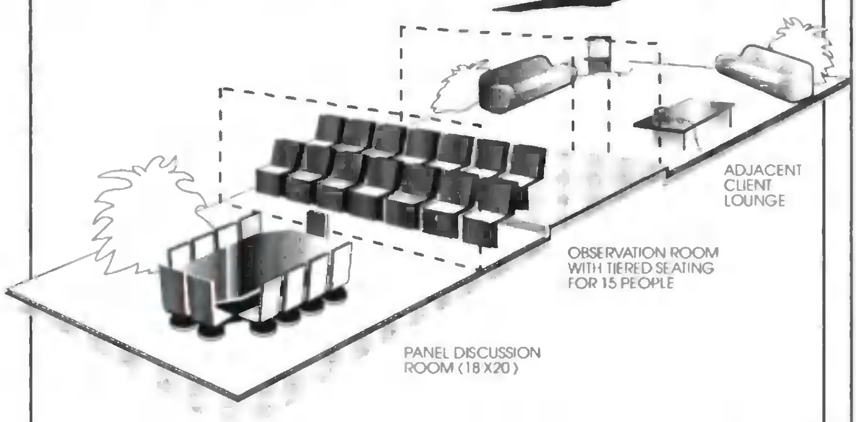
- Clear likes and dislikes exist for the sensory characteristics of products (foods, health and beauty aids).
- Significant inter-individual differences appear from study to study. People differ from each other in their likes and dislikes.
- Defined clusters of consumers have specific identifiable sensory preferences. These are the "sensory preference segments." Sensory segmentation pervades all products.
- Sensory preference segments transcend conventional brand usage patterns, demographics and national boundaries. A common set of sensory preferences exists worldwide; what varies is the relative size of each segment within a single country.

Research conducted between 1982 and 1990 has shown that sensory preference segmentation remained fairly consistent. There were three major and several minor groups of consumers with these clearly defined preference patterns:

- high impact group (likes bright colors, strong flavors);
- modest impact group (indifferent to colors, likes moderate flavors and complex textures); and
- low impact group (indifferent to colors, wants weaker flavors and simple textures).

Recent research is revealing a new pattern, shaping up as follows:

- Segmentation has become more complex. It used to be possible to classify consumers into three to five segments. Researchers think many more segments exist now than before.
- There are no longer clearly defined



"high," "medium," and "low" impact groups, even within the flavor category.

• Texture as a segmenting variable for sensory preferences seems to have lost much of its clout. Consumers who before had clear texture preferences now like many different textures.

The reasons for these changes are threefold:

• Consumers are becoming more adventuresome in the products they will accept (for example, as a result of advertising).

• There are many more products available for consumers to try. Consumers are finding that they like many new products that present new flavors and textures.

• Brand loyalty is eroding, and with it an expectation that the product "must have a certain taste or texture." Brand loyalty brought with it expectations about the sensory "rightness" of a product. That sense of "rightness" created the heart of the consumer's sensory preference. Now there is no more "right." For more information, call 914-428-9204.

Home shopping grows

More Americans are watching TV, then dialing and buying. A recent Bruskin/Goldring OmniTel survey of 1,000 adults showed that 14% of respondents said they had bought something from one of the two major cable merchandising channels. Purchasers were evenly divided between QVC and Home Shopping Network at 8% a piece; two percent have used both.

Those most likely to buy from TV vary according to the network. QVC shoppers tend to be slightly older than Home Shopping Network buyers, with 77% of QVC patrons 35 or over, compared with 63% for Home Shopping Network. Conversely, 37% of Home Shopping Network buyers were in the 18- to 34-year-old range, vs. 23% for QVC. Respondents earning more than $40,000 were more likely than any other income group to buy from Home Shopping Network (10%). More residents of the Northeast and South shopped from home.

Optical scanners eye prices accurately

The Illinois Department of Agriculture, Springfield, Ill., reports that retail optical scanners entered accurate prices more than 95% of the time. The scanners are used at check-out counters in many stores to read into cash registers identifying information from bar codes about product price, type and brand.

When an error occurs, it's usually because incorrect pricing information was programmed into the store computer, not because the scanner misread the information. Department inspectors randomly select at least 10 items at Illinois stores equipped with scanning devices and compare the advertised price for each item with the price that scanners enter into cash registers. Items on sale often are used in the tests to determine whether sale prices are reflected at the register. During recent inspections of 50 stores, 995 items were scanned for price testing. Inspectors determined that stores overcharged for 34 of the items and undercharged for 11. Overall, 4.5% of scanned prices were incorrect.

Inspectors test about 80,000 weighing and measuring devices and indicators a year, including commercial scales, octane and liquid measurement readings of motor fuel pumps, and net quantities listed on prepackaged goods in grocery stores. For more information call 800-582-0468.

Shoppers want convenience and savings

A new study shows that more than hot specials are required to appeal to today's shoppers, who are trying to save time as well as money. The Philadelphia-based Consumer Network Inc. asked shoppers across the country to send in and comment on ads and circulars they thought were especially good or bad. The firm conducted similar studies in 1988 and 1990; it finds that in 1993 shoppers are more interested in ads that actually help them shop: ads that are organized like the stores and include pictures that help them locate new and re-packaged products on the shelf.

The study, called "New Perceptions of Supermarket Advertising," also found that:

• Store brands are welcomed in the store, but irritate shoppers when they are advertised, unless they are special features or part of a special promotion or program. The irritation is based on two assumptions: that shoppers don't need ads to tell them that store brands cost less; and that store brands are supposed to cost less than advertised products because they are not advertised.

• Pictures of store managers — especially when they are white and male — irritate some shoppers because they suggest sexism and/or racism.

• Spacious image ads that once delighted everyone now irritate environmentally concerned shoppers, who feel that full-page newspaper ads should not be used in a way that flaunts the wasteful use of resources like paper.

The 127-page study is based on feedback and submissions from more than 5000 shoppers. It includes shopper-annotated photocopies of 106 "good" and "bad" supermarket ads nationwide, and 20 slides of the best and worst ads they critiqued. For more information call Mona Doyle at 215-386-5890.

Readers turn to local news first

Forget the funny pages — newspaper readers want to know what's happening at home first. According to an OmniTel study by Bruskin/Goldring, Edison, N.J., more than a quarter of the 1,000 adults surveyed said they read local news first. National and world news followed, at 21%, and sports took third place, at 13%. If women are excluded, however, sports ranks No. 1 (25%) and is especially popular with men aged 18 to 24 (28%). In contrast, only 2% of women turn to the sports pages first.

Entertainment sections (which include comics, horoscope, and movie and TV listings) received equal shares of men and women (8%), but this section's fans vary significantly by age. Younger readers (18 to 24) are much more likely to scramble for this section, compared with respondents aged 50-plus (24% vs. 3%, respectively). Slightly more men (10%) than women (7%) turned to business news first; women, on the other hand, beat out men by a five-to-one ratio in the search for coupons and inserts.

Enterprise-wide computing still growing

By 1998, 92% of large companies will have complete enterprise-wide networks linking all company departments, according to initial results from a survey on enterprise-wide computing. The study was conducted by IntelliQuest Inc., Austin, Texas, and sponsored by CMP Publications of Manhasset, N.Y. The results confirm that enterprise-wide computing has become the growth market of the '90s, according to John Griffin, CMP's director of strategic marketing.

The study also found that:

• 53% of all PCs in large firms are connected to a network, compared with only 20% five years ago.

• The average company expects the number of file servers in use to more than double in the next five years.

• The number of gateways installed is expected to triple during the same period.

• Nearly half of all respondents mentioned "business survival" as a reason why they installed their enterprise-wide network.

• Electronic mail is the top application driving enterprise-wide networks.

The study also examined the role that enterprise-wide networks will play in computer-related purchase decisions — for example, 51% of all software purchases in the last 12 months were affected by network considerations. The study additionally highlights the increasing role that network professionals will play in computer purchase decisions. Respondents predict that network managers will have the highest degree of influence over purchase decisions in the coming years, says Kelly Sims, IntelliQuest networking specialist.

The study is based on disk-by-mail interviews sent to 344 randomly selected company sites with more than 1,000 employees. In total, 63% of the sites surveyed responded to the survey. IntelliQuest completed multiple interviews per site to segment individuals by role, i.e. if they were involved in the design, purchase, installation and maintenance of enterprise-wide systems. Interviews were also conducted by fax with senior managers to obtain qualitative information about the needs driving investments in enterprise-wide networks. For more information call John Griffin at 516-562-7442.

Prescription drug ads slip past consumers

Well over half (59%) of adults in a recent nationwide survey were unaware of prescription drug advertisements, according to Attitude Measurement Corp., Southampton, Pa. The study found that about 40% of the nearly 11,000 adults surveyed did notice prescription drug ads. Of that group, the most common sources were network TV (58%), magazines (52%) and cable TV (28%). Regardless of their awareness level, about half the respondents felt that such advertising was positive, compared with 27% who deemed it negative, and 22% who were neutral or unsure. The favorable reaction stemmed mainly from the feeling that such advertising increased awareness and knowledge. Those against prescription drug advertising felt it could be misleading or encourage a desire for unneeded medication. This group also felt it was the responsibility of the physician — not the advertiser — to supply information about such drugs. For more information, call Bob Schumer at 215-364-1440.

Spreading the news

The spirit of evangelism — proselytizing — is vigorously alive in the United States. Forty-six percent of American adults, or 115 million people, believe they have a personal responsibility to share their religious beliefs with others, according to a Barna Research Group survey. Of this group of evangelizers, however, a disproportionate number are conservative Christians, many of whom fall outside the classic mainstream Protestant camp. But many pastors express doubt about their flocks' evangelistic competence.

The biggest difference fell squarely along religious lines, with 57% of Protestants wanting to share their beliefs — including a whopping 71% of "born again" believers — while only 31% of Catholics feel similarly. Regular churchgoers also felt more responsibility. Educated and wealthy Americans were not only least likely to evangelize but probably unlikely to be evangelized. On the other hand, 54% of Americans earning less than $20,000 annually or who had no college experience felt a strong sense of evangelical responsibility.

Black Americans were the most enthusiastic, at 62%, with whites at 44% and Hispanics at 32%. The proselytizing fervor was highest in the South, where 56% of residents felt they should evangelize, and weakest in the Northeast, at 38%.

Data for the survey were drawn from the semiannual OmniPoll, conducted in February 1993 by Barna Research Group, Ltd., Glendale, Calif. For more information call George Barna at 818-241-9300.

Best to you each morning
(and afternoon and evening)

Most Americans eat breakfast, but definitions of breakfast, and breakfast time, stretch well past eggs and bacon at 7:30 sharp. The Sampler reports that a recent survey by Response Analysis, Princeton, N.J., found that 90% of us ate breakfast, but many of us "extend" our breakfast hours well into work. Almost three-quarters of working people eat at home, 17% eat or drink something on the way to work, and 68% (including some who have already eaten at home or in transit) have something after getting to work. The survey focused on food consumption during the first part of the respondent's day, regardless of whether the respondent started the day in the morning, afternoon or evening.

Four items (fruit juice, bread products, cold cereal and a hot drink) were especially popular, consumed by 20% of the 1,003 respondents. Coffee was by far the most popular hot drink. Almost 60% felt they ate a good breakfast, although some admitted that potato chips and candy bars constituted their breakfast.

Drug dosage instructions perplex many

Most Americans misinterpret instructions on drug dosage. Even seemingly clear instructions like taking medication "on an empty stomach" or "every eight hours" can cause confusion. A survey of almost 1,100 adults by Attitude Measurement Corp., Southampton, Pa., found that 75% of respondents thought taking medication on an empty stomach meant taking it after meals, while about 10% thought it meant taking it just before or during meals. The phrase "every eight hours" was prone to even more misinterpretation: Two-thirds thought it meant taking their medication three times a day, and almost 30% thought it meant taking medication twice a day. Attitude Measurement Corp. also found that a quarter of the respondents felt their primary care doctor wasn't telling them everything they need to know about their prescription drugs, especially possible side effects, although they overwhelmingly believed (76%) that witholding information was not intentional. These findings suggest that consumers still need to be proactive in pursuing medical information.

Men preen, too

Grooming products formerly associated with women are gaining ground in men's bathroom shelves as well. A recent survey by New York-based Market Facts Inc. conducted for *GQ* magazine, found that more men are using products like mousse, fragrance and facial moisturizer, and spend an average of 40 minutes daily on personal grooming. The overwhelming motivation (89%) was personal appearance, and 70% think people consider them good-looking.

Almost 80% used hair conditioner, 55% used facial moisturizer, 45% used hair spray, 31% used astringent, 27% used mousse, 20% used body scrub, 19% used a facial mask, and 12% used anti-aging cream. Almost two-thirds used fragrance regularly; 88% bought after trying a sample, 51% after trying a scent strip in a magazine. Nearly 68% said they borrowed or bought grooming products advertised for women. However, 75% said they would not use a hair-replenishing potion if it took five years off their life.

The survey of 1,000 men also found very specific buying patterns. Respondents bought toothpaste, deodorant, mouthwash, pain relievers and shampoo most often in a supermarket; fragrance, facial moisturizers and cleansers, lotion, astringent and anti-aging/eye cream most often in a department store; vitamins and minerals, sun protection, and hairspray most often in a drugstore; and hair gel, mousse and facial masks most often in a salon.

In other findings, the survey reported that:

- 67% paid more attention to their diet than five years ago; 87% said they exercised mainly to improve health.
- Irritation from shaving was the major skin care problem among 37% of respondents, with nearly the same percentage concerned about avoiding wrinkles.
- 70% used condoms; of that group, 59% used them to protect against sexually transmitted diseases, 51% for birth control, and 14% because their partner insisted. In a related finding, more than two-thirds said they have changed their sexual behavior because of sexually transmitted diseases, with about the same percentage reporting an active sex life.
- More than half felt that "flirting or sexual joking in the workplace" was not acceptable; 41% said they were careful about their work behavior because of sexual harassment.
- Vanity is not an exclusively female domain: 82% reported checking their appearance in a mirror at least three times during the day.

Research Company News

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wide that will receive a site visit in September by a team of Baldrige award examiners. The site visit is the final step in the selection process.

The Brand Institute Inc. has opened offices at 300 Park Ave., 17th floor, New York, NY 10022. Phone is 212-572-6311, fax is 212-572-6411. The firm is a brand identity consultant specializing in name development. Services include brand strategy assessment, creative ideation/brainstorming, trademark screening, linguistic screening and communication name evaluation (qualitative and quantitative market research). U.S. and international market research capabilities are available for name development and testing. James L. Dettore is president and CEO; Robin Niecko is vice president and general manager.

Field Research Corp. has relocated to: 550 Kearny St., San Francisco, CA 94108. Phone is 415-392-5763; fax is 415-434-2541.

FocusVision Network Inc., New York, has received the top award from the International Teleconferencing Association for "most significant application of teleconferencing in two-way video." The award was given for the company's use of videoconferencing in transmission of live focus groups.

Genesis Research Associates has relocated to: 3150 Almaden Expressway, San Jose, CA 95118. Phone is 408-445-7877, fax is 408-445-0117.

Group 1 Software, Lanham, MD, has signed a letter of intent with Pittsburgh-based Advanced Software Applications Corp. to distribute ModelMAX, a new automated predictive modeling software application. ModelMAX enables direct marketers to perform sophisticated modeling using desktop computers, with no special user skills required. ModelMAX is based on a hybrid of advanced technologies, including neural networking, and expert system and a genetic algorithm. An 80486 PC with a math co-processor is advised. ModelMAX runs under Windows 3.0 or higher and requires an ANSI standard C compiler to export models to alternate platforms such as a mainframe or midrange computer.

Herron & Associates, Greenwood, IN, has finished a 9,000-square-foot renovation. The facility features state-of-the-art furnishings and equipment. For more information call Jerry Ice at 317-882-3800.

IntelliQuest Inc., Austin, TX, has received equity funding from Austin Ventures, also of Austin, and Summit Partners, Palo Alto, CA. The investments will be used to assist IntelliQuest in expanding its products and services to the high-technology community. Austin Ventures is a venture capital firm with more than $160 million of capital under its management; Summit Partners manages approximately $675 million in investments. IntelliQuest also has announced it will conduct market research jointly sponsored by Intel Corp. and Microsoft Corp. Initial funding for the $2 million study also will be provided by CMP, IDG and Ziff-Davis publishing houses. The study is expected to be completed by the end of 1993. The study will measure media behavior among a broadly defined audience of computer-related purchase influencers for business and home users. The proposed 10,000 respondents will have a range of computer product-buying responsibilities for computer systems, software, peripherals and networking products. The study will examine readership of computer-related and general interest publications, and viewership of broadcast and cable television programs. Participation in the study is open to all publishers, manufacturers and advertising agencies. For more information call Debbie Shure at 512-329-2424.

Richard Kurtz has returned to New York from the United Kingdom and will be offering a full range of quantitative and qualitative market research services, with an emphasis on international work. He will be resuming his affiliation with Seaport Surveys, which will enable him to conduct large-scale phone and personal interview studies on a national and localized basis. Kurtz can be reached at 34 Cliff St., New York, NY 10038. Phone is 212-608-3100, fax is 212-608-4966.

Lieberman Research West, Los Angeles, CA, has formed a new division that specializes in total quality management. Charles "Chuck" Teaman, has been appointed vice president and will lead the new division. For more information call Susan Jefferson at 310-575-1059.

Mercator Computer Systems, Ltd., Bristol, England, has opened a U.S. subsidiary, Mercator Corp., The Carriage House, 28 Green St., Newbury, MA 01951. Phone is 508-463-4093, fax is 508-462-9198. Mercator, founded in 1982, is a software house specializing in data and information processing solutions, and is the author of SNAP data analysis software. Through the new U.S. office, Mercator will bring Snap Professional, its latest questionnaire and survey analysis package, to the North American market this fall.

DIRECTORY OF QUALITATIVE RESEARCH / FOCUS GROUP MODERATORS

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

Access Research, Inc.
8 Griffin Road North
Windsor, CT 06095
Ph. 203-688-8821
Contact: Gerald M. O'Connor

Action Research, Inc.
230 Western Avenue
Boston, MA 02134
Ph. 617-254-0360
Contact: Steven Davis
Advert., Consumers, Publishing New Prod. Dev., Small Business.

ADI Research, Inc.
(See Matrixx Marketing)

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

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

Asian Marketing Communication Research/Division of HMCR
1535 Winding Way
Belmont, CA 94002
Ph. 415-595-5028
Contact: Dr. Sandra M.J. Wong
Qual./Quant. Rsch. in Cantonese, Mandarin, Japanese, Korean, Tagalog, etc. U.S. & Intl.

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

George I. Balch
635 S. Kenilworth Ave.
Oak Park, IL 60304
Ph. 708-383-5570
Contact: George Balch
Experience With Advertisers, Agencies, Government.

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

Calo Research Services
10250 Alliance Road
Cincinnati, OH 45242
Ph. 513/984-9708
Contact: Nick Calo
Extensive Technology, Bus.-Bus., Positioning Experience.

Cambridge Research, Inc.
5831 Cedar Lake Rd.
St. Louis Park, MN 55416
Ph. 612-525-2011
Contact: Dale Longfellow
High Tech, Executives, Bus.-To-Bus., Ag., Specifying Engineers.

Chamberlain Research Consultants
4801 Forest Run Rd., #101
Madison, WI 53704
Ph. 608-258-3666
Contact: Sharon Chamberlain
Full-Service Marketing Research/Business & Consumer Studies.

The Clowes Partnership
P.O. Box 791
South Norwalk, CT 06856
Ph. 203/855-8751
Contact: Rusty Clowes
New Product/Advertising/All Ages/ Focus & Mini Groups.

Communications Workshop, Inc.
168 N. Michigan Ave.
Chicago, IL 60601
Ph. 312-263-7551
Contact: Lisa J. Hougsted
Consumer, Executive, Technical & Children Grps.

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

Corporate Research Center, Inc.
106 Fairidge Ct.
Jamestown, NC 27282
Ph. 919-884-8614
Contact: John Deuterman
Dual Moderating, M + F Moderators; Video N/C; Kids.

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

Cunninghis Associates
6400 Flotilla Dr., #56
Holmes Beach, FL 34217
Ph. 813-778-7050
Contact: Burt Cunninghis
37 Years Exp., Moderator & Moderator Training.

The Davon Group
10 W. Broad St.
Columbus, OH 43215
Ph. 614-222-2548
Contact: Barry J. Mastrine
Specialize in Focus Groups and Executive Interviews.

Diener & Associates, Inc.
200 Park Bldg., Ste. 111
Research Triangle Park, NC 27709
Ph. 919-549-8945 or 800-467-8945
Contact: Mary E. Diener
Business/Communications/Environmental/ Health/Medical/Ed.

DMSC Research
3790 El Camino Real, #398
Palo Alto, CA 95448
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Data Use

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base manipulations and spreadsheet calculations.

But for researchers trying for the first time to measure the size of a market, or to determine market shares or other quantitative information, finding the right statistics can be a problem.

At least four solutions are available to the researcher who needs the economical efficiency of a stratified random sample, but who does not have the benefit of an existing database describing the relevant market.

1. Statistics texts usually recommend that a small "pilot survey" be conducted in advance. Even a relatively small survey can provide a rough estimate of the statistics needed, and this can be far better economically than using a simple proportional allocation. Unfortunately, it is sometimes difficult to delay the major investigation by a few weeks to conduct a pilot survey, and allocating a budget for this type of work can pose a special challenge.

2. Sometimes one can calculate the needed statistics from data collected in a survey of a similar market. For instance, if no information were available on the distribution of patient monitors among U.S. hospitals, the researchers might have looked for a database of some other product with some similar market characteristics. For instance, survey data for some types of ultrasound equipment, infusion pumps or advanced operating room devices might have been substituted, at least for the first survey, to find estimates of the required statistics.

3. Begin the survey using a simple proportional allocation plan, and gather the required statistics as the data comes in. This approach requires some very quick handling of survey data, especially if the surveying process is providing many new answers every day. Still, the analyst can perform calculations on the available data every day or two, and make periodic decisions about when to cut off surveying in each market segment. The method described here can only work if there is a great degree of randomness among the early respondents — the analyst would not want to stop telephone surveys to small hospitals if, for example, only the West Coast had been called. (This technique would be difficult to apply to a mail survey, unless one has the luxury of sending out mailings in waves.)

4. Simply use a rough guess about appropriate sample sizes, and plan to improve on the allocation method the next time the survey is conducted. For example, there are probably many medical equipment markets like the patient monitors example, in which sales and usage are more diverse among large hospitals than among small ones. If the researcher thinks that the market to be studied has this characteristic, then there is probably something to be gained by using a sample allocation matching the one shown in Fig. 4. Recognizing this, a market researcher might arbitrarily allocate more of the sample to large hospitals, and less to small ones, and hope for the best. The advantage of this approach is that it is very easy and inexpensive; the disadvantage is that it simply does not take full advantage of the methods of stratified random sampling.

Conclusion

Stratified random sampling is a technique that can give some dramatic benefits, by lowering the cost of surveys such as the patient monitors project described here. As was pointed out in this example, proper stratification of the sample can save hundreds of telephone interviews among surveys of hospital markets.

The techniques used for stratification also help solve some of the questions many researchers have about the accuracy of the results they have worked so hard to gather. Market analysts with a strong quantitative background can master the statistical calculations involved, and finish their research investigations with much greater confidence in the meaning of the results.

The information presented here applies to almost any quantitative survey — not just to hospital markets for medical equipment. Stratifications by geographic region, customer size, purchasing method, age, sex, urban/rural setting, and many other categories are common in market research. In each case, the researcher has decided to use these statistical techniques to gain the benefits of accuracy and economics in conducting market research. Properly applied, stratified random sampling gives the researcher a much higher level of confidence in survey results and conclusions, making market research a more reliable and effective activity in any industry or application. ❑

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Some Theory of Sampling, W. E. Deming, Dover Publications, New York, 1966.

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industries. The Image-Link, an optional add-on module to ASA, allows the system to link graphic images to any location on the map. ASA operates on PC-compatible computers running DOS 3.1 or higher with a minimum of 640K RAM and a 40MB hard disk. Users must have Atlas GIS to operate the system. Strategic Mapping is offering a fall "back to business" promotion where Atlas Site Analyst comes free with the purchase of $1,000 worth of Atlas Demographic Packages or 1990 Census Packages. The offer is good until Nov. 15.

The company also has available low-cost upgrades to its Atlas GIS and Atlas Pro software programs. Version 2.1 of Atlas GIS and Atlas Pro new features include: the ability to receive and plot global positioning satellite (GPS) information in real-time, for use in mobile/dispatch applications; an updated point file for all five-digit ZIP codes; current world geographic boundary files and recent demographic data from the 1990 census; and a new address-matching algorithm.

A new version of Atlas MapMaker is available. The software program for IBM-compatible personal computers runs on Microsoft Windows. MapMaker for Windows version 1.1 includes such new features as an updated data starter set with current world geographic boundary files and demographic data from the 1990 Census. The program supports Windows 3.1-specific elements, and has improved support for "drag and drop." For more information call 408-970-9600.

Chilton offers express service

Chilton Research Services, Radnor, Pa., has introduced Chilton's Express Omnibus. The package offers a hotline to answer questions, which can be submitted as late as Wednesday for results the following Monday. The quality sample includes: 1,000 adults interviewed nationwide; fully replicated, representative, single-stage RDD sample; multiple callbacks; random respondent selection within the household; sample balancing by age, race, sex and education; and a full five-day field period. Demographics are available in standard or deluxe tab packages. For more information, call 1-800-EXP-POLL.

New version of MapInfo available

MapInfo Corp., Troy, N.Y., has begun shipping MapInfo version 2.0 desktop mapping software for the Macintosh and UNIX (Sun and Hewlett-Packard) platforms. The new version includes new geographic and presentation features for viewing and analyzing corporate data geographically. The company also is shipping the MapBasic development environment for Macintosh and UNIX. With MapInfo version 2.0, the MapBasic development environment enables use and integration of desktop mapping in business. Windows versions of both products are also available. MapInfo for Macintosh incorporates Balloon Help, support for Apple Events and the ability for MapBasic applications to call external commands and functions. It also supports Apple Script, Apple's new programming language. MapInfo for Sun and Hewlett-Packard supports remote procedural call operations. For more information call Lisa Jacobson at 518-274-6000, ext. 7205.

Simmons, MIT join forces to target consumers

Simmons Market Research Bureau Inc. and Marketing Information Technologies Inc. (MIT) have entered a strategic partnership to offer advertisers the ability to target the consumers most likely to buy their product. For example, the same magazine could contain a sports equipment ad sent to the home of a sports enthusiast, or a "fat-free" product ad sent to a dieter. MIT's custom segmentation tools are sensitive to an advertiser's particular brands and user behavior. For more information call Simmons at 212-916-8900 or 312-951-4400.

New GIS databases from Claritas

Claritas/NPDC Inc., Alexandria, Va., has designed Trendline-GIS and STF-3 InfoPak-GIS, two database products for use with geographic information system (GIS) software. The products can be used with ArcView, Atlas, MapInfo, Spans and Tactician software. Trendline offers three database options and files derived from Claritas/NPDC's demographic current-year estimates and five-year projections. Summary Tape File 3 (STF-3) contains the first release of sample data from the 1990 decennial census. STF-3's 17 files are arranged into data sets called InfoPaks, to help guide users quickly to the relevant data. The databases are available in compact disc, Tecmar 8mm tape, on-line via MAX Access, and diskette. For more information call 703-683-8300.

Copy testing method zeroes in on consumers

NFO Research Inc., Toledo, Ohio, and New York-based ASI Market Research Inc. will jointly market NFO/ASI targeted copy testing. The new method combines ASI's copy testing system with NFO's in-home testing among targeted samples of consumers drawn from the 425,000-household NFO panel. Targeted samples of consumers (for example, chronic ailment sufferers, the mature market, households with children, etc.) can be selected for copy testing. The NFO/ASI system uses NFO's video-based method, which tests advertising in the respondent's home, combined with ASI's copy testing experience and normative databases. The ASI system offers multimeasure capabilities. For more information call Melanie Mumper-Dickerson at 419-661-8560.

Interactive TV card introduced in U. S.

New York-based ActivCard Networks Inc. has introduced ActivCard for use in the United States. The portable interactive television device links home television viewing with in-store sales, allowing advertisers to find out which commercial, at what time, and on what channel influenced a consumer's purchase choice. The system also records corresponding in-store purchases, allowing marketers to quantify the level of sales from specific commercials. The consumer can participate in various interactions with programming, including game shows, home shopping, couponing and training seminars; the card can later be inserted into a terminal at a retail store where coupons, rebates, discounts, proof of participation, gifts and other rewards are delivered. The system also can offer electronic betting and frequency programs, and purchasing and educational activities. The ActivCard resembles a small calculator and weighs less than 2 oz. For more information call Kenneth Fineman at 212-692-3535.

Simmons to distribute PDI scanner data

Simmons Market Research Bureau Inc. has acquired exclusive access to publication-related supermarket scanner data from Promotion Decisions Inc. (PDI), for magazines and advertisers. PDI supplies promotion concept testing, promotion and pricing evaluation through store-level and household-level supermarket scanner data. With this data, advertisers can evaluate the effectiveness of brand advertising with a passive behavioral measurement of sales behavior; brand sales can be tracked before and after a specific ad appears. The data can also be used for single-copy circulation management. For more information call Simmons at 212-916-8900 or 312-951-4400.

Joint venture yields syndicated targeting system

Claritas/NPDC, Alexandria, Va., has joined forces with Dallas-based TRW Inc.'s target marketing services division to combine P$YCLE household-level segmentation and a direct marketing database. The joint effort will allow marketers to target consumers according to their wealth and use of financial products. Marketers can profile their customers and segment their market by matching their proprietary customer files to the P$YCLE-coded TRW file of U.S. households. Marketers can later return to TRW and order precise prospecting lists using P$YCLE as a list select, or enhancement. The P$YCLE segmentation system divides households into 27 distinct types according to use of specific financial products and other financial characteristics. TRW's database of consumers now contains codes for these segments. For more information call Mike Reinemer at 703-683-8300.

GIS seminars explain it all for you

GIS World Inc., Fort Collins, Colo., has introduced its 1993 GIS Discovery Seminar Series. The seminars explain how geographic information systems can be applied to various industries. The training facility at GIS World Inc. headquarters is equipped with 486 microcomputers and a UNIX workstation for hands-on training. Courses for 1993 include Introduction to GIS and Marketing, GIS in Health Care, GIS in Banking and GIS in Real Estate. For more information call Christy Burns at 303-223-4848.

Financial profiles available

Claritas/NPDC Inc. has available Financial Prizm Profiles for financial marketers. The information looks at customer/prospect use of financial and consumer products, lifestyle pursuits and media habits. Uses of the profiles include branch location and analysis, customer profiling, cross-selling, strategic planning, direct marketing, new product development, media planning, market potential analysis, and actual vs. potential sales analysis. The data is available as a national sample of U.S. households; local profiles of 25 variables are available for 38 market areas. The information can be accessed using Claritas/NPDC's Compass workstation. For more information call 703-683-8300.

WATS center now has disaster-contingency feature

Bruskin/Goldring Research, Edison, N.J., has added a new feature to its "bulletproof" system for prompt delivery of survey results. The firm's four regional WATS facilities enable it to transfer interviewing loads to other parts of the country when natural disasters strike or other circumstances disrupt operations at any location. Each WATS

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center is linked to the firm's central computer. The newest feature of the "bulletproof" system is a back-up computer system. The redundant system will ensure that all data are processed regardless of any unforeseen circumstances. For more information call 908-572-7300.

New model gauges brand equity

Simmons Market Research Bureau Inc. has introduced EQX, a model for measuring brand equity in media, including print, broadcast and cross-media assessment. EQX measures brand strengths and weaknesses based on consumer values. The model can predict how changes to the various attributes can influence overall equity, and can simulate various strategies for each magazine and predict the net outcome. Simmons also has introduced its Product Information Booklet printed in Spanish. For more information, call 212-916-8900 or 312-951-4400.

Study examines EDLP strategy, information

Information Resources Inc., has conducted a new study, "Managing Your Business in an Every Day Low Pricing (EDLP) Environment." The study address such questions as: Are prices really lower? Do EDLP stores merchandise less often/differently? Are the effects of merchandising different? How do distribution strategies compare? How do sales rates compare? Do certain categories or departments behave differently from the norm? How can manufacturers operate more efficiently in this environment? Analysis of private labels and their influence on sales also is included. For more information call 312-715-2641.

Study respondents can be recontacted

Bruskin/Goldring Research, Edison, N.J., has available numerous respondents, contacted through its OmniTel studies, who can be recontacted to participate in other Bruskin/Goldring studies. Breakdowns by age, sex, income, geographic region and education are available. Information on home ownership, race, primary shopper, household size and composition, cable ownership, and driving behavior also can be provided. The data is collected each week. For more information call 908-572-7300.

Prizm system now has Canadian version

Claritas/NPDC Inc., Alexandria, Va., and Toronto-based Compusearch have developed a Canadian version of Claritas/NPDC's Prizm Cluster system. The new Canadian Market segmentation system, called Prizm Canada, defines every neighborhood in Canada in terms of 24 lifestyle types ("clusters"). Many of these clusters also appear in the U.S. version of Prizm, including "furs and stations wagons," "gray power," "back country folks" and "middle America" (renamed "middle Canada"). The system will be marketed by each firm in its respective country. For more information call 703-683-8300. Claritas/NPDC also has released "Precision Demographics: How Claritas NPDC Annually Updates Local Demographic Data," the second volume of its Market Essentials Expert Series. The free bulletin explains the methodology behind the firm's annual demographic update for small neighborhoods throughout the United States. For a copy call 800-284-4868.

Study on sports participation now out

The National Sporting Goods Association (NSGA), Mt. Prospect, Ill., now has available the "Sports Participation in 1992: Series II" study. This year's edition features a newly introduced equipment purchase question. The 96-page report surveyed 21 sports including: billiards/pool, canoeing, horseback riding, ice and street hockey, ice and roller/in-line skating, skateboarding, scuba and snorkeling, table tennis, water skiing and windsurfing. The survey includes estimates of total dollar equipment expenditures per household for the sports, and establishes correlations between participation and purchases; percentage of total household expenditures for categories ranging from less

(See listing on p. 67)

than $50 to more than $750; and demographic breakdowns. For more information, call 708-439-4000.

Technology in schools report available

Market Data Retrieval (MDR), Shelton, Conn., has available its report "Education and Technology 1993." The survey, based on responses from almost 4,000 districts and over 31,000 public schools grades K through 12, reports findings on use of videodisc players and eight other educational technologies. For more information call Sal Capozzi at 203-926-4800.

New data and report programs hit market

Raosoft Inc., Seattle, has released Raosoft UFill and Raosoft UReport. UFill version 2.0 is a runtime data gathering program; UReport version 1.2 is a runtime report generator. The two products are the final links in the Raosoft SURVEY information gathering and analysis system for use with non-technical and technical personnel. UFill provides for paperless data collection, and will support mail-out disks, pop-up forms on network and notebook entry for data collection. UReport is a DOS-based report generator that allows users to produce ready-made reports from any dBASE-type database or Raosoft SURVEY database files. For more information call Catherine McDole Rao at 206-525-4025.

Predictive CATI program combines features

Valley Forge Information Service has introduced the Predictive CATI. The telephone survey technology combines predictive dialing, a computerized list management and telephone dialing capability with CATI. The new product is designed especially for complex projects such as low-incidence tracking studies using random sampling. For more information call 215-757-0200. Valley Forge is the market research division of ICT Group Inc., Langhorne, Pa.

Newsletter covers women consumers

EDK Associates, N.Y., has available a preview of its newsletter, EDK FORECAST: Women Consumers. The bimonthly newsletter covers the firm's ongoing polls of American women. The preview issue includes articles on emotional shopping, mother-daughter relationships, phone use and the feminist market. For more information call Lisa Lederer or Nancy Thompson at 202-371-1999.

Personal computer buying tracked

Trendata Inc., Norwalk, Conn., has available findings on personal computer purchases. A projectable telephone sample of 50,000 households is contacted the first 10 days after the end of each quarter; qualifying households are taken through a 50-question interview. More than 200,000 households are contacted yearly. Custom callbacks through the Trendata PC database are available. For more information call Louis Pappalardo at 203-866-3113.

New version of marketing information system

MarketPulse, Cambridge, Mass., has introduced MarketPulse C/S, an enhanced version of the company's advanced mainframe marketing information systems. The new version incorporates client/server architecture and integrates with Windows software, Pilot's Lightship and MapInfo. It brings advanced database marketing to the non-technical business user, allowing them immediate and simultaneous access to millions of customer records and transaction-level data. Other system features include enhanced customization, and campaign planning and tracking features. For more information call 617-868-6220.

Annual sourcebook of company information out

Washington Researchers Publishers has released the revised 1992-93 edition of its sourcebook "How to Find Information about Companies." The 675-page publication has been updated to include more than 9,000 sources, including libraries, on-line databases, CD-ROMs, and federal, state and local government agencies, for researching businesses in any industry. Also included are sections on identifying company and industry experts, contracting for research, and using private investigation, credit reporting and bond rating services. For more information call 202-333-3499.

Comprehensive study available on children's market

Simmons Market Research Bureau has released the 1993 edition of "The Kids Study." The survey is a comprehensive marketing and media study on children aged 6 to 14; the new edition includes new product and service categories, including a beverage category expanded to include juices and powdered soft drinks; an expanded electronic category that includes computer information services, VCR usage and video games; and a new school/writing and art/drawing supplies category. The study is available in printed volumes or electronically through Choice, a PC application for accessing Simmons syndicated databases. The survey is based on in-home personal interviews and written questionnaires from 2,200 children. The sample is drawn from a national probability sample of households participating in the 1992 Simmons Study of Media and Markets. For more information call J. Chiaramonte at 212-916-8954.

Paumanok publishes gun/ammo companies list

The Primary List division of Paumanok Publications Inc., Shoreham, N.Y., has available its firearms and accessories original equipment manufacturers mailing list. The list is a result of Paumanok Publications' market research analysis, "The U.S. Market for Firearms and Accessories." The list is segmented into domestic and overseas manufacturers of pistols, revolvers, rifles, shotguns and ammunition. For more information call 516-821-6303.

NRD adds mobile interviewing unit

NRD Marketing Services Inc., Hillsdale, N.J., has added a mobile interviewing unit (MIU) to its services. The MIU is a converted mobile home with two interviewing stations. It has a self-contained power source, and full kitchen and bath facilities. The MIU can be used to conduct copy or product tests among hard-to-reach populations. An ethnic interviewing staff is available. For more information call Glenn Weissman at 800-221-6293.

Study looks at skin pharmaceuticals market

New York-based FIND/SVP has available a new 208-page report entitled "The Market for Dermatological Drugs." For more information, write FIND/SVP, Dept. Q9A, 625 Avenue of the Americas, New York, N.Y. 10011.

Direct marketing software puts catalogs on-line

Information Clearinghouse Inc., Rancho Dominguez, Calif., has introduced the software program Market/Net. The software program allows users to put product catalogs on-line. Customers can look and order directly through a personal computer, and can create customized catalogs of frequently ordered items. Prices and product lines can be changed instantly, for constant updating. Market/Net can display full-color graphics and fax back information for each catalog line or page. Customer can print their own order sheets, which can also be used as the purchase order. For more information call 800-537-7373.

Shopping mall research service introduced

Market Facts, Inc., Arlington Heights, Ill., has introduced National Showcase, a shared-cost research service. The service is conducted weekly among 500 adults at malls in the top 20 ADI markets. The new service is designed for marketers interested in in-person demonstration of their products and services. It will cover concept package and product testing, concept screening and advertising testing. For more information call Patrick Gorman at 212-460-8585.

"Competitive Due Diligence" analyzes competition

The Daniel Adams Co., Danbury, Conn., has introduced "Competitive Due Diligence," a new service. The firm works with client companies from beginning to end, from setting objectives and investigation scope, through review and analysis of existing data, conducting field research, to development of competitive profiles and presentation of results. Projects usually take from 60 to 90 days. For more information call Joyce Clark at 203-797-9142.

Interuational marketing directories updated for 1993

Atlanta-based MacFarlane & Co. Inc. has published its 1993 collection of International Marketing Directories and Business References. The 1993 collection includes 74 international marketing publications, which can be used by companies involved in or targeting markets in Europe, the Pacific Rim and other industrialized nations. For more information, call 404-352-2290.

Investext adds new contributors to databases

The Investext Group of Boston has 10 new contributors to its MarkIntel on-line databases of market research. The contributors expand coverage of industries to include health care, consumer products and technology. The two databases are: MarkIntel, which features reports by business publishing firms; and MarkIntel Master, which features exclusive on-line primary research from consulting and market research firms. Both databases are offered exclusively on The Investext Group's on-line delivery service, I/PLUS Direct. The new contributors to MarkIntel include: Datamonitor, UK, with research on U.K. and European consumer product and service markets; Drewry Shipping Consultants, U.K., providing research on the international maritime industry; FIND/SVP, U.S.A., providing research on the food and beverage and health care industries, and demographic markets; M.I.R.C., U.S.A., specializing in high technology and medical products market research; Nicholas Hall & Co., U.K., with information on consumer health care products; and Packaged Facts, U.S.A., analyzing specific consumer market products including household products, specialty food and beverages, and home health products. New contributors to MarkIntel Master include: Moscow Consulting Group, U.S.A., supplying research and analysis on the markets of the Commonwealth of Independent States (former Soviet Union countries); Ovum Ltd., U.K., specializing in computing and telecommunications; Palmer Market Research, U.K., providing research on U.K.

home construction; and POV Inc., U.S., contributing health care research on pharmaceuticals, OTC medications, biotechnology and diagnostics. For more information call 617-345-2380.

BRX/Global adds Line X-Tnsion Brand Equity

BRX/Global, Rochester, N.Y., has added Line X-Tnsion Brand Equity to its family of brand equity measurement techniques. Line X-Tnsion enables senior corporate executives to determine if using a strong brand name that has been developed in one category can reduce the cost and risk of entry into a new category. The technique is also useful for advertisers who are considering co-branding. Line X-Tension complements the Brand Equity Monitor and $9.99 Price Testing, the two existing brand equity services currently offered by BRX/Global. For more information call Joel Axelrod at 716-442-0590.

Market Data reports on Japanese computer industry

Market Data International Inc., Landenberg, Pa., has released "The Japanese Computer Industry" report. The 263-page report was translated from the original, by the Japanese firm Yano Research Institute Ltd. The report finds that the Japanese computer industry is facing many of the same problems as other industries in a slow economy. The leaders in the computer market were NEC, Fujitsu, IBM Japan, Hitachi and Toshiba. The computer market dropped 2.1% from 1991 to '92. One way that stores are trying to increase profits is to charge a fee for services, including software-related fees; reception to this new policy, however, is expected to be cool. For more information call 215-255-5735.

Doane Marketing to release corn growers study

St. Louis-based Doane Marketing Reset has completed "The 1993 Genetically Enhanced Corn Seed Study," a shared-cost market research project. The study contains qualitative and quantitative assessments of corn growers' perceptions about genetically enhanced corn seed. The study used focus groups and a mail survey to poll more than 800 growers who have at least 100 acres of corn. The study measures the present and long-term likelihood of trying herbicide-resistant/tolerant and insect-resistance corn seed. Also to be determined are the perceived benefits, drawbacks and key determinants for use. Corn growers are categorized by their relative level of innovativeness. Results will be available for clients at the end of October. For more information call David Tugend at 314-878-7707.

M.AI.D. drops connect charges for subscribers

New York-based Market Analysis & Information Database Inc. (M.A.I.D.) announced in July that it has dropped all connect charges for new and existing subscribers. The new policy will allow customers to go on-line, search and download tables of contents and report titles and otherwise browse without paying the standard change of $45 per hour. With each $10,000 subscription, M.A.I.D. is offering 100 free connection hours. Subscribers pay normal line fees on the news or market research information they need (8 cents per line and up for market research and 6 cents per line for news). M.A.I.D.'s Researchline database provides on-line market research, including publishers FIND/SVP, Packaged Facts, Euromonitor. Its news and business databases include Reuter Textline, Dun & Bradstreet and Moody's. For more information call John Wagner at 212-447-6900.

Customer Insight, TRW offer database marketing system

Customer Insight Co. Inc., Englewood, Colo., and TRW Target Marketing Services, Orange, Calif., have teamed up to offer database marketing systems for segmenting and targeting customers, analyzing trends and evaluating the effectiveness of marketing promotions. With the PC-based systems from Customer Insight, users can combine customer and prospect information with TRW demographic and financial data in an integrated custom marketing database system. Financial service businesses that purchase the database marketing system can add TRW data to their system any time and apply standard and custom risk and response models to their customer information. Under the agreement, TRW is licensed to market Customer Insight's products and the OnDesk system for updating databases and merging prospect and customer information on-site. The joint database marketing system includes hardware, software, training and support. For more information call Andrew Kamlet at 303-790-7002.

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understand customer loyalty of business customers and consumers. The model's key components or constructs (like "customer satisfaction" and "relative perceived quality") are applicable to either market segment. What will differ are the specific facets, or "indicators," through which each construct is measured and analyzed.

Depending on a company's marketing programs, its business or consumer market segments may differ in many important respects. This is also true for customer loyalty. Business customers tend to have more diverse, complex needs and priorities, and more pragmatic and objective purchase motivations than consumers. Both business customers and consumers are confronted with a readily available, diverse range of alternative product sources.

Key elements of the CS/CL model

The CS/CL model considers interactions among a number of key components, or constructs. The model uses the constructs of customer loyalty, customer satisfaction, and product versus service definitions.

According to the CS/CL model, the loyalty of a company's customers is divided into customer intentions and customer behavior.

• Customer purchase/repurchase intentions are the extent to which a given customer intends, at a given point in time, to continue purchasing currently used products and services from a company rather than from competitors; and/or purchase future products and services from a company rather than from competitors.

• Customer loyalty behavior is the extent to which, over a given period, the customer actually continues purchasing products and services from a company rather than from competitors; and/or purchases future products and services from a company rather than from competitors.

The key point of this definition is that both components address the all-important question of customer purchase/repurchase behavior.

This distinction between customer loyalty as intention versus behavior is one of the model's key elements. A customer's intention to remain loyal to a company must precede the actual behavior. However, the intention does not guarantee that the actual behavior will result. Over time, research based on the CS/CL model produces an empirically based assessment of the specific ways in which customer intentions of loyalty influence the extent to which they actually remain loyal to a company.

The CS/CL model defines customer satisfaction with an emphasis on the specific ways in which customer satisfaction includes customer loyalty. Customer satisfaction is defined as the degree to which customers' perceptions of the company's product and service quality meets or exceeds their expectations.

For purposes of maximizing customer loyalty, the CS/CL model makes a consistent distinction between product and service. In some industries, the distinction between "product' and "service can be very vague. Overnight express delivery service, for example, could be called either a product or a service. The model defines "product" in terms of design, and "service" in terms of delivery.

The model defines "product" as design of a service, in terms of the performance that addresses customer's application needs and priorities; the functionality, or ease, with which customers can use the product; and the customer's perceived value the product delivers relative to its price. "Service" refers to the delivery of the service in terms of resolution of problems; ease of doing business; and billing and other administrative procedures involved in using the "product."

Understanding this distinction between product and service is essential to understanding the CS/CL model. Using this definition, for example, overnight express delivery service is now a "product," but the effectiveness with which it is delivered to customers concerns "service."

Research methodology

The CS/CL model is not a prefabricated design for customer satisfaction research, but a conceptual model of the general process through which a company achieves and maintains customer loyalty. The model's component constructs are potentially applicable to products and services in virtually any industry. The model provides a general design framework to guide research planning for a company's customer loyalty situation.

At a general level, the research process design includes:

• initial qualitative research to identify potential indicators for customizing the model's 25-plus constructs;

• developmental quantitative research for final development of statistically valid and reliable construct indicators;

• initial quantitative surveys to provide statistically projectable planning information and set baselines against which future progress will be measured; and

• periodic "impact studies" to monitor customer loyalty levels and provide ongoing information for fine-tuning customer loyalty programs and initiatives.

As in the research process, the data analysis design is also customized within the CS/CL model. Generally, the model calls for various multivariate statistical techniques including:

• factor analysis and reliability analysis, for testing potential construct indicators and confirming the validity and reliability of the various construct measurement scales;

• multiple regression analysis and other similar multivariate correlation analysis techniques, used in the "casual modeling" that elaborates how the model's constructs function in each client's unique situation;

• "data-driven segmentation analysis," a combination of statistical procedures (including factor analysis, cluster analysis, cross tabulation and discriminant analysis), to identify "natural customer loyalty segments" in the client's market.

Customer Satisfaction Directory

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

Access Research, Inc.
8 Griffin Rd. N.
Windsor, CT 06095
Ph. (203) 688-8821
Robert G. Wuelfing, President

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

Full service research firm offering questionnaire design, all forms of data collection, including computer-aided telephone interviewing capabilities, multivariate analysis, online monitoring, and national mystery shopping. Experienced with tracking studies, customer satisfaction, image, and advertising research. Sophisticated, service-oriented, focus group facility located near businesses and diverse socio-economic neighborhoods. Experienced moderators, complimentary video tapes, and executive interviews.
(See advertisement on p. 36)

The Advisory Group, Inc.
990-407 2nd St. S.W.
Calgary, AB T2P 2Y3
Ph. (403) 264-2440
Karen Paul, Senior Consultant

AHF Marketing Research, Inc.
100 Avenue of the Americas
New York, NY 10013
Ph. (212) 244-5555
Beryl L. Levitt, President

Anderson, Niebuhr & Associates, Inc.
North Park Corp. Center, #200
Six Pine Tree Dr.
Arden Hills, MN 55112
Ph. (612) 486-8712
John Anderson, President

Answers Research
225 Stevens Ave., #108
Solana Beach, CA 92075
Ph. (619) 792-4660
Albert Fitzgerald, Director of Client Services

Apian Software, Inc.
P.O. Box 1224
Menlo Park, CA 94026
Ph. (800) 237-4565 ext. 317
Bill Ray, Director of Marketing

SURVEY PRO is fast, easy, professional integrated survey software to measure customer satisfaction and do market research. Automated layout creates desktop publishing quality questionnaires fast, with 20 built-in scales or design your own. Data entry screens are automatically built from the questionnaire; no database programming needed. Reports tabulate and cross-tabulate checkboxes, ratings and written answers into tables and graphs.
(See advertisement on p. 55)

Applied Decision Analysis, Inc.
2710 Sand Hill Rd.
Menlo Park, CA 94025
Ph. (415) 854-7101
Lynne Weber, Principal

Atlantic Marketing Research
109 State St.
Boston, MA 02109
Ph. (617) 720-0174
Peter F. Hooper, President

The Atlantis Group, Inc.
420 N. Fifth St., Ste. 740
Minneapolis, MN 55401
Ph. (612) 333-3744
John Bosma, President

Marketing consulting through custom designed marketing research and powerful proprietary analytic methods. Specialists in customer satisfaction. Our innovative approaches, concern for quality, depth of analysis, and bottom line focus provide you with action-oriented solutions and strategic tools. Our revenue enhancement model, REVISSA™, will identify the specific aspects of your services or products that most influence customer satisfaction and retention.
(See advertisement on p. 61)

BAI
580 White Plains Rd.
Tarrytown, NY 10591
Ph. (914) 332-5300
Kathleen Knight, President

Barlow Research, Inc.
10550 Wayzata Blvd.
Minnetonka, MN 55305
Ph. (612) 545-6620
John Barlow, President

Bay Area Research
9936 Liberty Rd.
Randallstown, MD 21133
Ph. (410) 922-6600
Tamara Zwingelberg, President

Gordon S. Black Corp.
135 Corporate Woods
Rochester, NY 14623
Ph. (716) 272-8400
Robert C. Kallstrand, V.P. Research

Experienced, professional staff help to determine and prioritize key factors driving customer satisfaction, leading to actionable results. Past successes include customer satisfaction Management programs for industrial, health care, consumer, insurance, banking and service industry segments. We are a full service market research firm providing insight into product and service strategies most likely to improve a company's positioning and market share.
(See advertisement on p. 62)

The Blackstone Group
360 N. Michigan Ave.
Chicago, IL 60601
Ph. (312) 419-0400
Ashref Hashim, President

Bell Associates
27 Grey Birch Pl.
The Woodlands, TX 77381
Ph. (713) 367-4224
Darla D. Bell, President

Irwin Broh & Associates, Inc.
1011 E. Touhy Ave.
Des Plaines, IL 60004
Ph. (708) 297-7515
Irwin Broh, President

Bruskin/Goldring Research
100 Metroplex Dr.
Edison, NJ 08817
Ph. (908) 572-7300
Richard B. Hare, President

Chadwick Martin Bailey, Inc.
186 South St.
Boston, MA 02111
Ph. (617) 350-8922
Anne Bailey Berman, President

Checkmetrix, Inc.
500 N. Michigan Ave., 12th fl.
Chicago, IL 60611
Ph. (312) 828-9200
Fax (312) 537-3113
Stephen Turner, President

Chesapeake Surveys
4 Park Center Ct., #100
Owing Mills, MD 21117
Ph. (410) 356-3566
Elizabeth Beirne, Director

Consumer Contact Ltd.
2450 Victoria Park Ave.
Willowdale, ON M2J 4A2
Ph. (416) 493-6111
Don Ambrose, President

Circle No. 238 on Reader Card

Creative & Response Research Service
500 N. Michigan Ave., 12th fl.
Chicago, IL 60611
Ph. (312) 828-9200
Sanford Adams, COO

Crossfield Marketing
11571 Buena Vista Dr.
Los Altos Hills, CA 94022
Ph. (415) 949-3937
Peggy Allen Lizaur, President

Data Recognition Corp. (DRC)
5900 Baker Rd.
Minnetonka, MN 55435
Ph. (612) 935-5900
Wayne M. Serie, Vice President

Dennis Research Service, Inc.
3502 Stellhorn Rd.
Ft. Wayne, IN 46815
Ph. (219) 485-2442
Pat Slater, Director

Ducker Research Co., Inc.
6905 Telegraph, Ste. 300
Bloomfield Hills, MI 48301
Ph. (313) 644-0086
Joanne D. Ulnick, Partner

Ducker Research specializes in business-to-business market research. We have been serving this sector for over thirty years. Understanding customer satisfaction is essential, however achieving customer loyalty is often overlooked. By developing improvement strategies, based upon customer contact, which impact all aspects of the business process, we help clients not only achieve customer satisfaction but build customer loyalty.
(See advertisement on p. 63)

Elrick & Lavidge
1990 Lakeside Pkwy., 3rd fl.
Tucker, GA 30084
Ph. (404) 938-3233
Jim Langendorfer, Vice President

Elrick and Lavidge is a full service provider of survey research to benchmark and/or track customer satisfaction. We can also work with you in designing MBNQA pre-assessments, employee satisfaction measurements, internal cost of quality evaluations and other quality service measurement programs. For more information call Larry G. Gulledge, Senior Vice President, Customer Satisfaction and Quality Service Measurement at (404) 621-7604, or write Elrick and Lavidge at the address above.
(See advertisement on p. 21)

Edward Epstein & Associates, Inc.
6800 Jericho Tpke.
Syosset, NY 11791
Ph. (516) 921-7500
Edward Epstein, President

Freeman, Sullivan & Co.
131 Steuart St., Ste. 500
San Francisco, CA 94105
Ph. (415) 777-0707
Patrice Souders, Business Development Mgr.

Goldstein/Krall Marketing
P.O. Box 3321, Ridgeway Station
Stamford, CT 06905
Ph. (203) 359-2820
Frederick A. Goldstein, President

Grassroots Research
4 Embarcadero Center, #2800
San Francisco, CA 94111
Ph. (415) 954-5493
Rebeca P. Moran

Guskey & Heckman Research Consultants
Duquesne University
School of Business Administration
Pittsburgh, PA 15282
Ph. (412) 396-5842
Audrey Guskey-Federouch, Ph.D.

Hammer Marketing Resources
179 Inverness Rd.
Severna Park, MD 21146
Ph. (410) 544-9191
William Hammer, President

Hancock Information Group
2180 West S.R. 434, Ste. 3170
Orlando, FL 32779
Ph. (407) 682-1556
Susan Hancock, President

Research you can profit from. Program development, questionnaire design, telephone interviews, coding and data entry, statistical analysis, graphic presentation, formal research summaries and much more. Experts at customer satisfaction measurement, competitive analysis/positioning, market trend analysis and intra-company assessment. Skilled at uncovering customer needs translating into more opportunities...and more profits. Hancock will help improve your image and bottom line!
(See advertisement on p. 64)

ICR Survey Research Group
605 W. State St.
Media, PA 19063
Ph. (215) 565-9280
Fred Soulas, President

Full service market research firm with particular emphasis on customer satisfaction research. ICR offers the full array of consulting services for service quality improvement efforts through qualitative "discovery," quantitative measurement of your customers' needs and expectations, formalized analysis and presentation, and subsequent performance tracking. Among ICR's areas of expertise are consumer and industrial products and services, telecommunications, utility services, pharmaceutical products, and food services among others.
(See advertisement on pp. 37,39,41)

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

I/H/R Research Group
4440 S. Maryland Pkwy., Ste. 203
Las Vegas, NV 89119
Ph. (702) 734-0757
Lynn Stalone, Partner

I/H/R Research Group provides high quality data collection, data processing and analysis services. Available for complete customer satisfaction projects, data collection only, or data collection and tabulation; 75-line telephone bank with all support services in-house; 50 Ci2/CATI integrated stations. MRA certified interviewers. Full off-premise monitoring.
(See advertisement on p. 35)

Indigo Marketing
716 N. 27th St.
Richmond, VA 23223
Ph. (804) 648-7110
Fax (804) 648-7110
Susan Bock, Owner

Integrated Research Group
1131 Westrac Dr., Ste. 202
Fargo, ND 58103
Ph. (800)282-6465
Stacy Halverson-Mengedoth, President

International Data Corp.
5 Speen St.
Framingham, MA 01701
Ph. (508) 935-4324
Terri LeBlanc-Bergstrom, Marketing Manager

Intersearch Corp.
132 Welsh Rd.
Horsham, PA 19044
Ph. (215) 657-6400
Alan Widra, President

JRP Marketing Research Services
100 Granite Dr., terrace level
Media, PA 19063
Ph. (215) 565-8840
Paul R. Frattaroli, President

Kearney & Associates, Inc.
1380 Lawrence St., Ste. 820
Denver, CO 80204
Ph. (30) 534-3044
Kevin Kearney, President

Keller Rosen & Associates
2950 Metro Dr., Ste. 313
Minneapolis, MN 55425
Ph. (612) 854-5623
Stuart Rosen, Vice President

Kubba Consultants, Inc.
2720 River Rd.
Des Plaines, IL 60018
Ph. (708) 296-1224
Ed Kubba, President

Maritz Marketing Research
1297 N. Highway Dr.
Fenton, MO 63099
Ph. (800) 446-1690
Phil Wiseman, Director, Marketing Services

Maritz Marketing Research, Inc. specializes in customized solutions to service quality needs. Utilizing customer satisfaction measurement, customer-focused training, reward and recognition systems and communications programs, Maritz supports and drives performance improvement strategies throughout an organization. Whether you need measurement or a totally integrated solution, Maritz is the answer—nationally and internationally.
(See advertisement on p. 5)

Market Opinion Research
31700 Middlebelt Rd., Ste. 200
Farmington Hills, MI 48334
Ph. (313) 737-5300
James Leiman, Ph.D., Senior Vice President

MarketPlace Research, Inc.
7800 Cooper Rd., Ste. 202
Cincinnati, OH 45242
Ph. (513) 891-8891
Gregory Widmeyer, Marketing Research Dir.

MarketVision Research, Inc.
MarketVision Building
4500 Cooper Rd.
Cincinnati, OH 45242
Ph. (513) 791-3100
Donald McMullen, President

An award winning full service research and consulting company with extensive experience in the design and implementation of customer satisfaction studies. MarketVision has developed an encompassing program of research and analysis to permit action oriented continuous improvement measurements. MarketVision provides employee attitude research, executive in-depth interviewing, continuous improvement monitoring, competitive tracking, management consulting and guidance. Offices in Cincinnati, Charlotte and Orlando. An *Inc.* 500 company.
(See advertisement on p. 15)

MATRIXX Marketing
4600 Montgomery Rd., Ste. 400
Cincinnati, OH 45212
Ph. (513) 841-1199
Brian D. Goret, Account Executive

Matrixx Marketing Research specializes in customer satisfaction services for a diverse client base. Our "Service and quality measurement" program has been specifically designed to help you determine how you measure up to your customer' expectations. The Matrixx program features: 1. "Action" comments, transmitted daily, immediately informing you of unresolved customer problems; 2. "Verbatim" comments, sent weekly, providing early warnings of service areas receiving negative performance ratings; and 3. Reporting of service area trends by primary segments or sub-segments. A division of Cincinnati Bell, Inc.
(See advertisement on p. 65)

McLauchlan & Associates, Inc.
3322 Erie Ave.
Cincinnati, OH 45208
Ph. (513) 871-8666
Staci McLauchlan, President

Meyers Research Center
58 W. 40th St.
New York, NY 10018
Ph. (212) 391-0166
Arthur Zimbalist, Vice President

Michelson & Associates, Inc.
3805 West Lane Dr.
Atlanta, GA 30080
Ph. (404) 436-0330
Mark Michelson, President

Midwest Marketing Research
214 S. Indiana Ave., P.O. Box 1077
Goshen, IN 46526
Ph. (219) 533-0548
Clifford J. Ahonen, Ph.D., President

John Morton Co.
203 N. LaSalle St.
Chicago, IL 60601
Ph. (312) 726-2010
Douglas Squeo, Executive Vice President

Muse Consulting, Inc.
6550 Van Buren Blvd., Ste. A/B
Riverside, CA 92503
Ph. (909) 688-3385
Laurie Maguire, Managing Director

National Survey Research Center
10107 Brecksville Rd., Ste. 340
Brecksville, OH 44141
Ph. (216) 838-7640
Alan Dutka, President

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

Opinions Unlimited
8201 S.W. 34th St.
Amarillo, TX 79121
Ph. (806) 353-4444
Anndel Hodges Martin, President

Full service custom research consulting and data collection. Fifty-station central CATI telephone interviewing facility. CATI programming (CI2), tabulation, analysis and reporting. State-of-the-art focus suites in two Texas locations, Amarillo and Houston. Internationally known moderator one of the principals. Over 12 years experience assessing customer satisfaction for electric/gas utilities, financial/insurance industry, consumer goods, service industries - consumer and business-to-business, agricultural and pharmaceutical industries.
(See advertisement on p. 59)

Circle No. 241 on Reader Card

Prince Marketing
2323 Hillsboro Rd. #301
Nashville, TN 37212
Ph. (615) 292-8686
Dan Prince, President

PROJECTIONS Marketing Rsch. & Counsel
47 Marlboro St./P.O. Box 585
P.O. Box 585
Keene, NH 03431
Ph. (603) 352-9500
Michael Kenyon, President

Quality Strategies
7850 North Beltline Rd.
Irving, TX 75063
Ph. (214) 506-3431
Corinne Maginnis, President

The Question Shop, Inc.
2860 N. Santiago Blvd., #100
Orange, CA 92667
Ph. (714) 974-8020
Ryan Reasor, Managing Director

Our success in serving our clients has allowed us to move into a brand new state of the art facility. Two spacious focus group rooms with the most modern features. A complete field service. Conveniently located in upscale Orange County. Centrally monitored telephones and computerized database. Our hallmark is our high quality, personally attentive service at a very competitive price.
(See advertisement on p. 28)

Rabin Research Co.
150 E. Huron #800
Chicago, IL 60611
Ph. (312) 482-8500
Michelle Elster, Vice President

Randolph & Daniel
49 Hill Rd., #4
Belmont, MA 02178
Ph. (617) 484-6225
Stephen Daniel, President

Reactions, Inc.
634 Berkeley Ave.
Orange, NJ 07050
Ph. (201) 673-4610
Donna Chlopak, Ph.D., President

The Research Center
P.O. Box 820
825 E. Douglas
Wichita, KS 67201-0820
Ph. (316) 268-6532
Marna Young, Research Manager

Restaurant Research Associates
Griffin Tower
6 Hutton Centre, Ste. 1240
Santa Ana, CA 92707
Ph. (714) 241-7930
Ronald E. Clark, Senior Partner

Restaurant Research Associates specializes in restaurant and food service research—from fast food to fine dining, as well as institutional, hospitality, and contract feeders. Complete services with full in-house support: study design, data processing, 75 line CRT phone bank, full monitoring capabilities, multivariate analysis. Product taste tests, concept testing, price/value, market segmentation, customer satisfaction, brand tracking, focus groups.

Rockwood Research Corp.
1751 W. County Rd. B
St. Paul, MN 55113
Ph. (612) 639-2229
Kevin Macken, Vice President

Full service provider of qualitative and quantitative studies. Quantitative studies use latest visual modeling techniques and segmentation analysis. Actionable reports clearly provide you with direction in maximizing market share.
(See advertisement on p. 31)

Service Strategies International, Inc.
12001 N. Central, Ste. 350
Dallas, TX 75243
Ph. (214) 233-3010
Pam Borders, President/CEO

Sources For Research
170 West End Ave., Ste. 30C
New York, NY 10023
Ph. (212) 787-8810
Fax (212) 580-4685
Phyllis Morrow, President

Unique qualitative resource for client and supplier. Insightful innovative capability to access the difficult-to-identify and -reach respondents in business-to-business markets nationwide. Financial services, corporate management, technology, human resources, health care, small business owners, sensitive client lists, upscale consumers. Remarkable show rates in every market. Diligent, detailed care applied in all disciplines: recruitment, moderating, executive in-depth, telephone interviews, one-on-ones.
(See advertisement on pp. 56,67)

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

Southern Research Group
460 Briarwood Dr., Ste. 300
Jackson, MS 39206
Ph. (800) 777-0736
Terri Abraham, Vice President

Strategic Research Inc.
4600 Devonshire Common
Fremont, CA 94536
Ph. (510) 797-5561
Sylvia Wessel, President

Survey Service of Western New York, Inc.
1911 Sheridan Dr.
Buffalo, NY 14223
Ph. (716) 876-6450
Susan Adelman, President

Total Research Corp.
5 Independence Way
Princeton, NJ 08543
Ph. (609) 921-8100
Theresa Flanagan, V.P. Quality Management

Total Research Corporation is a full-service marketing research and consulting firm that has pioneered the industry standard in customized, actionable, client-tested quality management processes. Total Research/Quality Management™ is a process that identifies, monitors and deploys critical elements of customer satisfaction and quality to provide actionable information to manage and improve quality. It combines custom design, advanced analytical techniques and improvement-oriented output (action planning). Total Research's Delphi Group provides quality improvement consulting and implementation services: deployment of customer requirements, strategy development, benchmarking, team building and Baldrige Award assessments.
(See advertisement on p. 66)

Turtle Bay Institute, Inc.
211 E. 51st St., Ste. 11C
New York, NY 10022
Ph. (212) 308-8830
Robert S. Weekley, President

USA/DIRECT, Inc.
627 Eagle Rock Avenue, Suite 104
West Orange, NJ 07052
Ph. (201) 731-0074
Guy Parker, President

Not just CSM...but, "CCSM"...targeted, efficient, actionable COMPETITIVE CUSTOMER SATISFACTION RESEARCH AND TRACKING...(your product or service measured vs. ALL MAJOR COMPETITORS... and. all measurements AMONG ALL KEY MARKET SEGMENTS)! Personal consultation, problem definition, program design, questionnaire development, reporting plan, full analysis of marketing problems and opportunities, recommendations for corrective action/competitive advantage. Over 25 years' fortune 500 Customer Satisfaction research and tracking experience.
(See advertisement on p. 43)

Walker: Customer Satisfaction Measurements, L.P.
3939 Priority South Dr.
Indianapolis, IN 46240
Ph. (800) 334-3939
Sheree L. Marr, Senior Vice President

Walker: Customer Satisfaction Measurements is a worldwide leader and pioneer in the areas of customer-perceived quality measurement and management. Walker: CSM provides an evaluation of company performance in meeting customer requirements and diagnostic tools for quality improvement priorities. Walker: CSM is the founding member of CSM Worldwide Network®, an organization dedicated to measuring and improving customer satisfaction and quality internationally.
(See advertisement on p. 68)

Willard & Shullman, Inc.
325 Greenwich Ave.
Greenwich, CT 06830
Ph. (203) 629-2233
Mark D. Willard, Managing Director

Margaret Yarbrough & Associates
934 Shorepeint Ct., Ste. 100
Alameda, CA 94501
Ph. (510) 521-6900
Margaret Yarbrough, President

Margaret Yarbrough & Associates provides focus group facilities, rooms for large clts., a permanent mall site and superior recruiting for all types of studies from executive to medical studies. We have been in business in the San Francisco Bay area since 1975 and our clients return study after study because of our superior reputation and customer satisfaction.
(See advertisement on p. 57)

Yarnell, Inc.
147 Columbia Tpke., Ste. 302
Florham Park, NJ 07932
Ph. (201) 593-0050
Dr. Steven M. Yarnell, President

Yee/Minard & Associates, Inc.
27300 W. 11 Mile Rd., Ste 500
Southfield, MI 48034
Ph. (313) 352-3300
Lynne Goodman, Vice President

Trade Talk

continued from p. 70

Consumer Expenditure Survey — the ongoing nationwide study of household spending — and organizing the data into easy-to-use tables grouped in chapters on food, shelter and utilities, household goods, apparel, entertainment, transportation, health care, personal care, financial products and services, and gifts. Expenditures in these areas are broken down into many subcategories and presented according to the type of "consumer unit," i.e., married couples, single parent with at least one child under the age of 18, etc.

Ambry teams up with Cheryl Russell on the second book, "The Official Guide to American Incomes." From a host of government sources (including the Census Bureau, the Bureau of Labor Statistics, and the Federal Reserve Board) the authors assemble hundreds of tables of data on household income, personal and discretionary income, along with information on poverty levels, and income and geography trends.

Finally, there's "The Art of Being Well Informed," by Andrew Garvin, with Robert Berkman and Hubert Bermont. Garvin is president of FIND/SVP, a New York-based research and information-gathering firm. The authors have written a short but sweet primer on how to get the most from the ever-expanding world of information.

The most powerful entities in this world are the on-line databases. They're a great resource, but they're also very expensive: When you're on-line, time is money. To get the most out of the databases for the lowest cost, you need to take the time to pinpoint what you're looking for. That's where this book might help.

In the chapter "Translating Your Problems Into Questions," Garvin offers some tips and sample situations that show how to approach breaking down your big question into a series of little ones. The book also contains helpful appendices listing major information sources, including the major on-line services, and general and specialized reference texts. As the authors readily admit, the book isn't designed to turn you into an information specialist, but "The Art of Being Well Informed" will certainly give you the working knowledge essential to finding the facts and figures you need. ❑

"The Handbook for Focus Group Research: Revised and Expanded Edition" ($24.95 hardcover, 222 pages) by Thomas Greenbaum, is published by Lexington Books, 866 Third Ave., New York, N.Y. 10022.

"The Official Guide to Household Spending" ($69.95 hardcover, 448 pages) by Margaret Ambry, and "The Official Guide to American Incomes" ($69.95 hardcover, 343 pages) by Cheryl Russell and Margaret Ambry, are published by New Strategist, P.O. Box 242, Ithaca, N.Y. 14851. Phone 607-273-0913.

"The Art of Being Well Informed" ($12.95 paperback, 194 pages) by Andrew Garvin, with Robert Berkman and Hubert Bermont, is published by Avery Publishing Group, 120 Old Broadway, Garden City Park, N.Y. 11040. Phone 800-548-5757.

Seniors Market

continued from p. 29

The Nutrition Concerned

Eating regular meals and not skipping meals is of great importance to only the Nutrition Concerned, who believe that how you feel is influenced by what you eat. More than the other two Food segments, they admit that they are swayed by advertising.

The Nutrition Concerned have a median annual pre-tax household income of $34,308, the highest of the three Food segments. Almost a third of the Nutrition Concerned have incomes of $50,000 or more.

The Fast & Healthy

Only the Fast & Healthy are interested in foods packaged for the microwave and in individual or smaller servings. The Fast & Healthy are trying to eat foods that are good for them. Only they prefer meeting friends at a restaurant rather than at home. The Fast & Healthy's median annual pre-tax household income of $30,759 is the lowest of the three Food segments. Still, 26% have incomes of $50,000 or more.

The Traditional Couponer

Only the Traditional Couponers are using more coupons for discounts and increasing their reliance on favorite brands. With little interest in healthy eating, the Traditional Couponers are using more convenience foods and cooking fewer meals. They favor restaurants which offer special discounts to people over a certain age.

The Traditional Couponers have a median annual pre-tax household income of $34,119, only about $200 less than the Nutrition Concerned. In this segment, 24% have annual incomes of $50,000 or more.

Companies which produce, distribute, and market foodstuffs should consider how each of the 50+ Food segments represents both a current trend and a future opportunity.

For example, restaurant chains in the casual dining category should look to the Fast & Healthy as a prime target. While only 57% of the Nutrition Concerned have eaten at such a restaurant once or more over the past month, 69% of the Fast & Healthy have done so. Over a year's time, the Fast & Healthy eat 19 meals at such restaurants.

While the Fast & Healthy favor meals which make some concessions to healthful eating, they would gravitate to a particular restaurant if it fosters socializing. The Fast & Healthy, after all, prefer to meet friends at a restaurant rather than cook at home.

The examples that I've presented from our 50+ study illustrate the possibilities offered by a segmentation based on attitudes, needs, and beliefs. Fusing demographics, behaviors, and media usage to such a segmentation creates the direction necessary for integrated marketing to a difficult-to-reach consumer group. This approach to the mature market, or to any market, unifies product development, marketing and advertising efforts, sales, and customer satisfaction. ❑

CLASSIFIED ADS

TRADE TALK

By Joseph Rydholm
editor

How about some light fall reading on focus groups, spending habits and on-line databases?

I know it seems like all I do in this space each month is review books, but it's either that or get a new desk. Each summer while we put together our annual Researcher SourceBook my pile of review books grows to towering proportions. I'm afraid if I don't get some of these tomes read, reviewed and off my desk, I'll sink into the sub-basement. Besides, when publishers are kind enough to send me a book, I try to review it, as long as it has some information you folks might be able to use. So without further ado, let's start lightening the load.

First up is "The Handbook for Focus Group Research" by Tom Greenbaum. Greenbaum, president of Groups Plus, a Wilton, Conn., focus group and consulting company, and prolific writer on qualitative research, has updated and expanded his popular 1988 book "The Practical Handbook and Guide to Focus Group Research." In this edition's introduction, Greenbaum lists reasons why he felt an update was warranted: things like changes in the moderator's role, new moderating techniques, increasing use of focus groups in the non-profit and legal sectors, the changing relationship between clients, moderators and research facilities, and the impact of satellite technology and teleconferencing on focus groups.

In his usual no-nonsense style, Greenbaum covers these and many other topics in detail, bringing a welcome sense of perspective to the current state of the focus group and how it might evolve. He also offers some nuts-and-bolts advice on controlling focus group costs, and facets of the client-moderator relationship. There's a particularly good chapter on the role of the focus group facility, concisely explaining what facility users can reasonably expect. This is especialy helpful because it often seems that everyone involved — clients, moderators and facility owners — has their own set of expectations. This section lays out a sensible list of what the facility can and should provide.

Next on the list are two books on consumer income and spending habits from New Strategist Publications. New Strategist continues its tradition of distilling masses of government data into usable form. As usual, both books are exhaustive and well-organized offering a wealth of information in an easy, quick-reference format. The first book is "The Official Guide to Household Spending." Author Margaret Ambry does us a favor, sifting through the government's

continued on p. 69

Experience Is The Best Teacher:

Learning from experience is a real experience in learning. When you attend a Burke Institute seminar, you participate in more than an exciting, on-target learning experience. You learn from the experienced professionals who have done more customized marketing research and have taught it to more people than anyone else in the world!

We cordially invite you to take advantage of our vast experience by attending one of our marketing research seminars. You will benefit from our:

- **Practical Experience** gained from doing numerous studies in all aspects of marketing research—positioning and segmentation, market structure analysis, competitive image assessment, copytesting, new product forecasting, concept screening and testing, product testing, test marketing, pricing and promotion assessment, tracking, distribution analysis, claim justification, and customer satisfaction.
- **Industry Experience** from working with companies representing consumer goods and services, industrial products, business to business services, pharmaceutical and health care organizations, advertising agencies, financial institutions, publishing and broadcasting, public utilities, and telecommunications.
- **Training Experience** exemplified by our seminar leaders who bring a wealth of practical know-how gained through years of working in the real world of marketing research, supported by impressive academic credentials and teaching experience.
- **Communications Experience** obtained from dealing with professionals at all levels in an organization, ranging from technically oriented researchers to decision oriented managers.
- **Consulting Experience** which is available to you even after the completion of a seminar to answer your technical questions.
- **Technical Experience** resulting from being on the cutting edge of information technology and analytical developments.
- **International Experience** which has taken us around the globe with seminars in 25 countries and operations in 29.
- **Administrative Experience** from having conducted over 1,900 seminars during the past 19 years and having counseled tens of thousands of participants on the program best suited to their needs.

These are just some of the reasons for the superlative evaluations we receive from our participants. Please call us toll free. We will be glad to send you a copy of some verbatims from recent seminar evaluations.

The Burke Institute

Partial Schedule of Seminars Through June 1994

101. Practical Marketing Research
- Boston .... July 12-14
- Cincinnati .... Aug. 2-4
- San Francisco .... Sept. 13-15
- Toronto .... Oct. 6-8
- New York .... Oct. 25-27
- Cincinnati .... Nov. 15-17
- Chicago .... Dec. 6-8
- New York .... Jan. 3-5
- Boca Raton .... Jan. 31-Feb. 2
- Cincinnati .... Feb. 28-Mar. 2
- Boston .... Mar. 28-30
- Toronto .... Apr. 18-20
- Chicago .... May 16-18
- Cincinnati .... June 6-8
- Atlanta .... June 27-29

104. Questionnaire Construction Workshop
- Cincinnati .... Aug. 9-11
- San Francisco .... Sept. 20-22
- New York .... Nov. 1-3
- Cincinnati .... Dec. 13-15
- New York .... Jan. 24-26
- Cincinnati .... Mar. 7-9
- Boston .... Apr. 4-6
- Cincinnati .... May 2-4
- Toronto .... June 20-22

105. Questionnaire Design: Applications and Enhancements
- Cincinnati .... Aug. 12-13
- San Francisco .... Sept. 23-24
- New York .... Nov. 4-5
- Cincinnati .... Dec. 16-17
- New York .... Jan. 27-28
- Cincinnati .... Mar. 10-11
- Boston .... Apr. 7-8
- Cincinnati .... May 5-6
- Toronto .... June 23-24

201. Focus Groups: An Introduction
- San Francisco .... Sept. 16-17
- New York .... Nov. 8-9
- Boston .... Feb. 24-25
- Toronto .... Apr. 21-22

202. Focus Groups: An Applications Workshop
- New York .... Nov. 10-11

203. Focus Group Moderator Training
- Cincinnati .... July 20-23
- Cincinnati .... Aug. 31-Sept. 3
- Cincinnati .... Oct. 19-22
- Cincinnati .... Nov. 30-Dec. 3
- Cincinnati .... Jan. 18-21
- Cincinnati .... Mar. 15-18
- Cincinnati .... May 10-13
- Cincinnati .... June 14-17

301. Writing and Presenting Actionable Marketing Research Reports
- Cincinnati .... Aug. 23-25
- Cincinnati .... Nov. 8-10
- Boston .... Feb. 7-9
- Cincinnati .... Mar. 21-23
- New York .... May 23-25

401. Managing Marketing Research
- Cincinnati .... Aug. 26-27
- Cincinnati .... Nov. 11-12
- Boston .... Feb. 10-11
- Cincinnati .... March 24-25

501. Applications Marketing Research
- Cincinnati .... Aug. 5-6
- New York .... Oct. 28-29
- Cincinnati .... Mar. 3-4
- Chicago .... May 19-20
- Atlanta .... June 30-July 1

502. Generating and Evaluating New Products and Services
- Chicago .... Aug. 31-Sept. 1
- Cincinnati .... Dec. 20-21
- Cincinnati .... Jan. 24-25
- Cincinnati .... June 2-3

503. New Product Forecasting
- New York .... Sept. 30-Oct. 1

504. Advertising Research
- Cincinnati .... July 22-23
- Cincinnati .... Oct. 7-8
- Cincinnati .... Feb. 17-18
- New York .... Apr. 28-29

505. Positioning and Segmentation Research
- Cincinnati .... July 20-21
- Cincinnati .... Oct. 5-6
- Cincinnati .... Feb. 15-16
- New York .... Apr. 26-27

506. Customer Satisfaction Research
- Toronto .... Oct. 4-5
- Chicago .... Dec. 9-10
- Boca Raton .... Feb. 3-4
- New York .... May 26-27

601. How to Summarize, Interpret and Explain Marketing Research Data
- Boston .... July 15-16
- Cincinnati .... Nov. 18-19
- New York .... Jan. 6-7
- Boston .... Mar. 31-Apr. 1
- Cincinnati .... June 9-10

602. Tools and Techniques of Data Analysis
- New York .... July 6-9
- Cincinnati .... Aug. 17-20
- Toronto .... Oct. 12-15
- Cincinnati .... Nov. 30-Dec. 3
- Boston .... Jan. 18-21
- Cincinnati .... Mar. 15-18
- Cincinnati .... May 10-13

603. Practical Multivariate Analysis
- New York .... July 28-30
- San Francisco .... Sept. 8-10
- Cincinnati .... Nov. 22-24
- New York .... Jan. 10-12
- Boston .... Feb. 21-23
- Cincinnati .... Apr. 11-13

701. International Marketing Research
- Chicago .... Sept. 2-3
- Cincinnati .... Apr. 14-15

702. Business to Business Marketing Research
- Cincinnati .... Oct. 19-21
- Cincinnati .... Jan. 26-28
- Cincinnati .... May 23-25

704. Pharmaceutical Marketing Research
- New York .... Sept. 27-29

Four-Week Certificate Program
- Cincinnati .... Aug. 2-27
- Cincinnati .... Feb. 28-Mar. 25

2 Week Segments
- Atlanta .... June 21-July 2
- San Francisco .... Sept. 13-24
- New York .... Oct. 25-Nov. 5

Please call Lisa Raffignone at 800-543-8635 (ext. 6135) for schedule information for the following seminars which are also currently offered by the Institute:

- Introduction to Marketing Research
- Marketing Research for Decision Makers
- Effective In-person Presentation of Marketing Information
- Pricing Strategy and Research
- Using Multivariate Analysis: A P.C. Based Workshop
- Experimental Designs for Marketing Research
- Industry Specific Seminars
  - Healthcare
  - Pharmaceutical
  - Telecommunications
  - Financial Institutions
  - Public Utilities
  - Automotive/Transportation
- Planning Marketing Strategies and Tactics Using Actionable Research
- Effectively Selling Marketing Research Services
- Negotiating Marketing Research Contracts
- Strategic Market Simulation

ALL OF THE ABOVE SEMINARS ARE AVAILABLE FOR IN-HOUSE PRESENTATION.

Please look over the list of our current seminars. Then call us toll-free. We will help you select the best seminar or other educational opportunity to meet your specific needs. Please call Lisa Raffignone, Marketing Manager, or Dr. Sid Venkatesh, President, at 800-543-8635 (ext. 6135) or 606-655-6135.

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